

**PA Leadership Charter School Board Meeting  
Executive Session:  
June 17, 2022**

**I. PERSONNEL:**

**PREVIOUSLY HIRED:**

**HIRING AT THIS BOARD MEETING:**

- Lori Daley—MS English Teacher at \$46,314.54 with appropriate benefits
- Jade Dorsey—Help Desk Technician at \$16/hour with appropriate benefits
- Kelly Muller—MS Math Interventionist at \$78,251.27 with appropriate benefits
- Deja Outten—MS Academic Advisor at \$18/hour with appropriate benefits
- Jennifer Scapellati—MS English Teacher at \$75,605.09 with appropriate benefits
- Alana Siegler—MS French Teacher at \$42,384.37 with appropriate benefits

**POSITION CHANGES:**

- Hanna Lewis—MS English Teacher at \$60,554.05 to HS English Teacher at \$62,673.44 with appropriate benefits
- Ann Sevick—USP Front Desk Receptionist, part time, at \$16/hour to Guidance Assistant, full time, at \$18/hour

**NOTE:** LTS – Long Term Substitute  
USP – University Scholars Program  
SPED – Special Education  
HR – Human Resources  
HS – High School  
MS – Middle School  
EL – Elementary  
PT – Part Time  
CPFA – Center for Performing and Fine Arts

**LEGAL:** May 5 and May 25 were other executive

**III. REAL ESTATE:**

**PA Leadership Charter School Board Meeting  
Agenda  
June 17, 2022  
1332 Enterprise Drive, West Chester, PA 19382**

**Starting Time: 2:05 PM**

**Ending Time: 4:15 PM**

**Opening activities:**

1. Call to order – Chairman of the Board of Directors
2. Public Notice: Public notice was given for this meeting in accordance with Act 93 of 1998, Section 1.
3. The Board met this afternoon in Executive Session to discuss personnel, legal and real estate matters.

**Note:** All meetings are on the **second Friday of the month**. Agenda will be posted on [www.palcs.org](http://www.palcs.org) website. Locate “Organization” in the toolbar and click “School Board Meetings and Board Members.”

**Future meetings:**

**Roll call:**

- Tom Curyto                     present [ ] not present
- Gary Dougherty             present [ ] not present
- Brian Ney                     present [ ] not present
- Carolyn Welsh               present [ ] not present
- Dr. John Wingerter         present [ ] not present

**Also present regularly:**

Mark Allen, Eileen Bowers, Carlos Castillo, Jim Hanak, Meredith Heckenberger,  
Seth Heiland, Andrew Lehr, Roger Masch, Mark Murray

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4. Pledge of Allegiance
5. Additions, deletions or modifications to the Agenda
6. Additions, deletions or modifications to the Minutes
7. Comments from the Public will be heard after Department Reports

1. **Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall accept the resignations of Dr. Brian Shuffler (effective immediately).

First: John Wingerter  
Second: Gary Dougherty  
Vote: Unanimous

2. **Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall accept the resignations of Sheriff Carolyn Welsh (effective Tuesday, June 20, 2022).

First: Brian Ney  
Second: John Wingerter  
Vote: Unanimous

3. **Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall accept the resignation of Dr. John Wingerter (effective June 20, 2022).

First: Gary Dougherty  
Second: Brian Ney  
Vote: Unanimous

4. **Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall accept the installation of Dan Truitt to be a PALCS board member. (See attachment B)

First: Carolyn Welsh  
Second: John Wingerter  
Vote: Unanimous

5. **Motion:** Be it resolved that the PA Leadership Board of Directors elect Gary Dougherty to be the Chairman of the PALCS Board of Directors effective June 20, 2022

First: John Wingerter  
Second: Tom Curyto  
Vote: Unanimous

6. **Motion:** Be it resolved that the PA Leadership Charter School Board of Directors will undertake a comprehensive review of the board bylaws and will recommend an updated version by July 15, 2022 (See attachment C).

First: Gary Dougherty  
Second: Tom Curyto  
Vote: Unanimous

7. **Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve moving the board meetings to the 3<sup>rd</sup> Friday of the month at 1pm and adding additional meetings for the 22-23 school year.
- Friday, July 15, 2022
  - Friday, September 16, 2022
  - Friday, October 21, 2022
  - Friday, November 18, 2022
  - Friday, January 20, 2023
  - Friday, February 17, 2023
  - Friday, March 17, 2023
  - Friday, May 19, 2023
  - Friday, June 16, 2023

First: Brian Ney  
Second: Dan Truitt  
Vote: Unanimous

8. **Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the minutes from the Board of Directors meeting from April 8, 2022. (See attachment D)

First: John Wingerter  
Second: Carolyn Welsh  
Vote: Unanimous

\*Dan Truitt abstaining  
\*\*Roger Marsh—finance committee, didn't know he was part of that and he is not. Remove him from list.

### **Fiscal Management:**

9. **Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall accept the financial report submitted by Dr. James Hanak and Roger Masch, and previously submitted to the board for review, and direct the CEO to pay the bills (as the money becomes available).

First: Tom Curyto  
Second: Brian Ney  
Vote: Unanimous  
\*\*Dan Truitt abstaining

10. **Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve the budget for the 2022-2023 school year which has previously been submitted to the board for review. (See attachment E)



First: Gary Dougherty  
Second: John Wingerter  
Vote: Unanimous

- 11. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors will continue a comprehensive review of all fiscal policies and procedures in order to tighten financial controls. The review will be conducted in consultation with outside accountants and financial advisors. Recommendations will be compiled into an Accounting Manual of Fiscal Policies and Procedures and presented to the Board no later than 7/15/22. (See attachment F)

First: John Wingerter  
Second: Gary Dougherty  
Vote: Unanimous

- 12. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the following revised policies which will be in the Accounting Manual of Fiscal Policies and Procedures document:

- Accounts Payable Policy (See attachment G)
- Allowability of Costs Policy (See attachment H)
- Cash Management Policy (See attachment I)
- Child Accounting Policy (new) (See attachment J)
- Confidentiality Policy (See attachment K)
- Conflict of Interest Policy (See attachment L)
- Document Retention Policy and schedule (new) (See attachment M)
- Internet Service Provider Policy (new) (See attachment N)
- Procurement Policy (See attachment O)
- Records Management Policy (See attachment P)
- Travel/Meal Reimbursement Policy (See attachment Q)
- Travel and Vehicle Use Policy (See attachment R)

First: Brian Ney  
Second: John Wingerter  
Vote: Unanimous

- 13. Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve the new position of Chief Financial Officer. (See attachment S)

First: Carolyn Welsh  
Second: John Wingerter  
Vote: Unanimous

- 14. Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve a revised teacher salary scale for school year 2022-23. (See attachment T)

First: Tom Curtyo

Second: Gary Dougherty  
Vote: Unanimous

- 15. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall make a settlement agreement payment to Owen J. Roberts school district for \$2,292.54 in reference to the 2018-2019 school year dispute. (See attachment U)

First: Gary Dougherty  
Second: Brian Ney  
Vote: Unanimous

- 16. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall make a settlement agreement payment to Ambridge school district for \$10,495.00 in reference to the 2017-18, 2018-19 school year dispute. (See attachment V)

First: Tom Curyto  
Second: Carolyn Welsh  
Vote: Unanimous

- 17. Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve a Consulting Agreement with Agentis Technologies for 1 year at an hourly rate of \$146.00 for a total of 6400 hours totaling \$934,400 to be paid on a monthly basis. As per the agreement, Agentis will design, develop, test and implement software enhancement to our school's learning content management system. Agreement runs from July 1, 2022 to June 30, 2023. (See attachment W)

First: Tom Curtyo  
Second: Gary Dougherty  
Vote: Unanimous

- 18. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve PALCS adoption of Raptor Emergency Management Services Platform at annual cost of \$9000, with an initial (one time) implementation fee of \$5,500. This program is an add on to the Raptor Visitor Management program that is already board approved and in use at PALCS and serves to protect our students and staff in the event of emergency by coordinating emergency communications to staff and first responders, reunifying students with guardians and also enhancing the effectiveness of emergency preparation drills. (See attachment X)

First: John Wingerter  
Second: Brian Ney  
Vote: Unanimous

## **Personnel:**

**Note:** Dr. James Hanak, CEO and Eileen Bowers, Director of Operations announced their retirement effective Friday, July 1, 2022.

- 19. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the hiring of all of the following personnel listed below:
- Lori Daley—MS English Teacher at \$46,314.54 with appropriate benefits
  - Jade Dorsey—Help Desk Technician at \$16/hour with appropriate benefits
  - Kelly Muller—MS Math Interventionist at \$78,251.27 with appropriate benefits
  - Deja Outten—MS Academic Advisor at \$18/hour with appropriate benefits
  - Jennifer Scapellati—MS English Teacher at \$75,605.09 with appropriate benefits
  - Alana Siegler—MS French Teacher at \$42,384.37 with appropriate benefits

First: Gary Dougherty  
Second: Carolyn Welsh  
Vote: Unanimous

- 20. Motion:** Be it resolved that the PA Leadership Charter School Board of Director shall approve the position changes of all of the following personnel listed below:
- Hanna Lewis—MS English Teacher at \$60,554.05 to HS English Teacher at \$62,673.44 with appropriate benefits
  - Ann Sevick—USP Front Desk Receptionist, part time, at \$16/hour to Guidance Assistant, full time, at \$18/hour

First: Brian Ney  
Second: Dan Truitt  
Vote: Unanimous

- 21. Motion:** Be it resolved that the PA Leadership Charter School of Directors shall approve the rate changes of all the following personnel listed below:
- Jamie Castle—USP Science teacher at \$62,442.08 at a rate change of \$67,461.68 with appropriate benefits
  - Michelle Gonnella—USP Front Desk Receptionist at \$16/hour at a rate change of \$18/hour with appropriate benefits
  - Merissa Pardus—HS Sped Life Skills Teacher at \$52,634.74 at a rate change of \$56,319.18 with appropriate benefits
  - Taylor Sforza—First grade teacher at \$42,384.37 at a rate change of \$45,351.27 with appropriate benefits

First: Gary Dougherty  
Second: Carolyn Welsh  
Vote: Unanimous

**22. Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve the proposed 18 new staff and position recommendations for the 2022-2023 school year. (See attachment Y)

First: Tom Curyto  
Second: Gary Dougherty  
Vote: Unanimous

**23. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors approve a Procurement Assistant to report to the Director of Operations at a compensation of \$24 per hour plus appropriate benefits.

First: Carolyn Welsh  
Second: Tom Curyto  
Vote: Unanimous

**24. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors approve the position of Center of Performing and Fine Arts Supervisor at \$80,000 salary plus appropriate benefits. (See attachment Z)

First: Brian Ney  
Second: John Wingerter  
Vote: Unanimous

## **Policy Issues:**

## **Old Business:**

## **New Business:**

**25. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the Flexible Hybrid Work Arrangement for 2022-2023 (See attachment AA)

First: John Wingerter  
Second: Gary Dougherty  
Vote: Unanimous

**26. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the new core textbook literature curriculum resources.

- Proposed 2022-2023 SY Textbooks (See attachment BB)
- Parent Feedback (See attachment CC)

First: Gary Dougherty  
Second: Tom Curyto  
Vote: Unanimous

- 27. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve yearly performance reviews to be conducted for each Director by the CEO with copies to the Board of Directors and completed by July 15, 2022. (See attachment DD)

First: Tom Curyto  
Second: Brian Ney  
Vote: Unanimous

- 28. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the PALCS Non-Discrimination Statement that will be included within the PALCS Employee Handbook, PALCS Instructor Guidelines, PALCS Student Parent Handbook, PALCS School Site, PALCS Public Website. (See attachment EE)

First: Tom Curyto  
Second: Brian Ney  
Vote: Unanimous

- 29. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the 22-23 school year Student Handbook. (See attachment FF)

First: Brian Ney  
Second: Carolyn Welsh  
Vote: Unanimous  
\*Dan Truitt abstaining

- 30. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the Orientation and Enrollment Schedule for the 22-23 school year. (See attachment GG)

First: Carolyn Welsh  
Second: Brian Ney  
Vote: Unanimous

- 31. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the "An Imagined Future Graduation Award". This is a financial award opportunity for students with formally-outlined transition plans that are planning on an alternative post-secondary pathway. First

award would be with the class of 2023 along with a \$250 annual pledge gift (raised via fundraising events). (See attachment HH)

First: Tom Curyto  
Second: Brian Ney  
Vote: Unanimous

- 32. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the Parent and Family Engagement Policy. (See attachment II)

First: Tom Curyto  
Second: Carolyn Welsh  
Vote: Unanimous

## **Special Reports:**

**3,882** Students enrolled in PALCS as of Tuesday, June 14, 2022 for the 2021-2022 school year. Down from 3,923 (April 8, 2022).

## **Review:**

### Finances:

- a. First year of operation – \$4.5 million (included \$234,000 implementation grant from the A Department of Education)
- b. Second year of operation – \$10.5 million (included \$100,000 implementation grant from the PA Department of Education)
- c. Third year of operation – \$17 million
- d. Fourth year of operation – \$19 million
- e. Fifth year of operation – \$21.4 million
- f. Sixth year of operation – \$23.5 million
- g. Seventh year of operation – \$25.2 million
- h. Eight year of operation – \$26.1 million
- i. Ninth year of operation – \$29.1 million
- j. Tenth year of operation – \$29.7 million
- k. Eleventh year of operation – \$30.9 million
- l. Twelfth year of operation – \$30.9 million
- m. Thirteenth year of operation – \$35.2 million
- n. Fourteenth year of operation – \$42.3 million
- o. Fifteenth year of operation – \$47.2 million
- p. Sixteenth year of operation – \$54.1 million
- q. Seventeenth year of operation – \$78.2 million

### School District Payments:

<b>District Billing 21-22 School Year</b>	May 31, 2022
<i>Total Billed 2021-2022 school year</i>	<i>-\$58,849,545.45</i>
<b>District Payments/Refunds 21-22 School Year</b>	
Total Payments from School Districts	\$43,373,003.18
Total Payments from UNIPAY	\$11,126,119.47
Total Refunded to District for Overpayments	-\$30,749.49
<i>Total Payments Received 21-22 School Year</i>	<i><u>\$54,468,373.16</u></i>
<b>Balance Remaining 21-22 School Year</b>	<b>-\$4,381,172.29</b>
<b>Outstanding Due Past School Years</b>	
Balance Due 20-21 School Year -Reconciliation	-\$2,660.50

**Department Reports:**

- Mark Allen – Academics/Performing and Fine Arts/University Scholars
- Eileen Bowers – Director of Office Operations
- Seth Heiland – HR
- Mark Murray – IT
- Carlos Castillo – Student Services

**Public Comments:**

**Adjournment:**

**33. Motion:** Be it resolved that the meeting of the PA Leadership Charter School Board of Directors shall adjourn.

First: Carolyn Welsh  
 Second: Gary Dougherty  
 Vote: Unanimous

**Ending Time: 4:15 PM**

**PA Leadership Charter School Board Meeting  
Executive Session:  
April 8, 2022**

**I. PERSONNEL:**

**PREVIOUSLY HIRED:**

**HIRING AT THIS BOARD MEETING:**

- Melissa Brown—USP Day Sub, \$18/hour with appropriate benefits
- Taylor Brown—CPFA Day Sub, \$18/hour with appropriate benefits
- Tina DeLuca—HS SPED Teacher, \$49,135.10 with appropriate benefits
- Kaylee McCarthy—SS Rep.-Orientations, \$16/hour with appropriate benefits
- Kelly Muller—MS Math Interventionist, \$78,251.27 with appropriate benefits

**POSITION CHANGES:**

- Maria Costanzi—MS Math Interventionist to MS Math Teacher with no rate change with appropriate benefits
- Morgan Dobson—Human Resources Administrative Assistant at \$18.54/hour to HR Generalist I-Payroll and Recruiter at \$23/hour with appropriate benefits

**NOTE:** LTS – Long Term Substitute  
USP – University Scholars Program  
SPED – Special Education  
HR – Human Resources  
HS – High School  
MS – Middle School  
EL – Elementary  
PT – Part Time  
CPFA – Center for Performing and Fine Arts

**II. LEGAL:**

**III. REAL ESTATE:**



**PA Leadership Charter School Board Meeting  
Agenda  
April 8, 2022  
1645 West Chester Pike, West Chester, PA 19382**

**Starting Time: 1:49 PM**

**Ending Time: 2:52 PM**

**Opening activities:**

1. Call to order – Chairman of the Board of Directors
2. Public Notice: Public notice was given for this meeting in accordance with Act 93 of 1998, Section 1.
3. The Board met this afternoon in Executive Session to discuss personnel, legal and real estate matters.

**Note:** All meetings are on the **second Friday of the month**. Agenda will be posted on [www.palcs.org](http://www.palcs.org) website. Locate “Organization” in the toolbar and click “School Board Meetings and Board Members.”

**Future meetings:**

- **June 10, 2022**

**Roll call:**

- Tom Curyto [X] present [ ] not present
- Gary Dougherty [X] present [ ] not present
- Brian Ney [X] present [ ] not present
- Dr. Brian Shuffler [ ] present [X] not present
- Carolyn Welsh [X] present [ ] not present
- Dr. John Wingerter [X] present [ ] not present

**Also present regularly:**

Mark Allen, Eileen Bowers, Carlos Castillo, Jim Hanak, Meredith Heckenberger, Seth Heiland, Andrew Lehr, Roger Masch, Mark Murray

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4. Pledge of Allegiance
5. Additions, deletions or modifications to the Agenda
6. Additions, deletions or modifications to the Minutes
7. Comments from the Public will be heard after Department Reports

- 1. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the minutes from the Board of Directors meeting from February 11, 2022.

First: Gary Dougherty

Second: Tom Curyto

Vote: Unanimous

## **Fiscal Management:**

- 2. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall accept the financial report submitted by Dr. James Hanak and Roger Masch and direct the CEO to pay the bills (as the money becomes available).

First: Carolyn Welsh

Second: Gary Dougherty

Vote: Unanimous

- 3. Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve a lease schedule on a Master Lease Line of Credit with HP Financial Services for the amount of \$855,973.20 term of 3 years, rate of 5.79%, with a monthly payment of \$25,961.67. The purpose of this lease is for staff and student computer hardware & computer upgrade for staff. Lease number is 21. (See Attachment A)

First: Carolyn Welsh

Second: Tom Curyto

Vote: Unanimous

- 4. Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve the sale of computers to the Asset Upcycling Division of HP Financial Services. This sale is in accordance with the Disposal of Equipment, Supplies, and Textbook Supplies Policy. Total sale amount is \$37,437.50. (See Attachment B)

First: Gary Dougherty

Second: John Wingerter

Vote: Unanimous

- 5. Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve a \$300 stipend for the PSSA & Keystone site leaders for this school year 2021-2022. (See Attachment C)

First: Tom Curyto

Second: Brian Ney

Vote: Unanimous

## **Personnel:**

- 6. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the hiring of all of the following personnel listed below:
- Melissa Brown—USP Day Sub, \$18/hour with appropriate benefits
  - Taylor Brown—CPFA Day Sub, \$18/hour with appropriate benefits
  - Tina DeLuca—HS SPED Teacher, \$49,135.10 with appropriate benefits
  - Kaylee McCarthy—SS Rep.-Orientations, \$16/hour with appropriate benefits
  - Kelly Muller—MS Math Interventionist, \$78,251.27 with appropriate benefits

First: Gary Dougherty

Second: Tom Curtyo

Vote: Unanimous

- 7. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the position changes of all of the following personnel listed below:
- Maria Costanzi—MS Math Interventionist to MS Math Teacher with no rate change with appropriate benefits
  - Morgan Dobson—Human Resources Administrative Assistant at \$18.54/hour to HR Generalist I-Payroll and Recruiter at \$23/hour with appropriate benefits

First: Tom Curyto

Second: Brian Ney

Vote: Unanimous

- 8. Motion:** Be it resolved that the PA Leadership Charter School of Directors shall approve the creation of the position of Administrative Assistant to the Director of Operations (DOO) at the rate of \$20 per house with appropriate benefits.

First: Tom Curyto

Second: Gary Dougherty

Vote: Unanimous

## **Policy Issues:**

- 9. Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve the following revised policies:
- Bullying Prevention and Intervention Policy (see Attachment D)
  - Dress Code, Personal Appearance and Personal Hygiene Policy (see Attachment E)

First: Gary Dougherty

Second: John Wingerter

Vote: Unanimous

## **Old Business:**

## **New Business:**

10. **Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the following books to the Core Literature list:
- USP: AMSCO Advanced Placement English and Composition by Abdon and McFarlan (See Attachment F)
  - Middle School: Chains (The Seeds of America Trilogy) by Laurie Halse Anderson (See Attachment G)
  - High School: How to Read Literature Like a Professor (See Attachment H)

First: Tom Curyto

Second: John Wingerter

Vote: Unanimous

11. **Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the agreement between PA Leadership Charter School and Lehigh Career and Technical Institute (LCTI) for the 2022-2023 school year (See attachment I)

First: Gary Dougherty

Second: John Wingerter

Vote: Unanimous

## **Special Reports:**

3,923 Students enrolled in PALCS as of Monday April 4, 2022 for the 2021-2022 school year. Down from 3,938 (February 11, 2022).

## **Review:**

Finances:

- a. First year of operation – \$4.5 million (included \$234,000 implementation grant from the A Department of Education)
- b. Second year of operation – \$10.5 million (included \$100,000 implementation grant from the PA Department of Education)
- c. Third year of operation – \$17 million
- d. Fourth year of operation – \$19 million
- e. Fifth year of operation – \$21.4 million
- f. Sixth year of operation – \$23.5 million

- g. Seventh year of operation – \$25.2 million
- h. Eight year of operation – \$26.1 million
- i. Ninth year of operation – \$29.1 million
- j. Tenth year of operation – \$29.7 million
- k. Eleventh year of operation – \$30.9 million
- l. Twelfth year of operation – \$30.9 million
- m. Thirteenth year of operation – \$35.2 million
- n. Fourteenth year of operation – \$42.3 million
- o. Fifteenth year of operation – \$47.2 million
- p. Sixteenth year of operation – \$54.1 million
- q. Seventeenth year of operation – \$78.2 million

School District Payments:

<b>District Billing 21-22 School Year</b>	March 31, 2022
<i>Total Billed 2021-2022 school year</i>	<i>-\$48,148,262.14</i>
<b>District Payments/Refunds 21-22 School Year</b>	
Total Payments from School Districts	\$34,937,395.39
Total Payments from UNIPAY	\$10,001,807.73
Total Refunded to District for Overpayments	-\$30,749.49
<i>Total Payments Received 21-22 School Year</i>	<i><u>\$44,908,453.63</u></i>
<b>Balance Remaining 21-22 School Year</b>	<b>-\$3,239,808.51</b>
<b>Outstanding Due Past School Years</b>	
Balance Due 20-21 School Year -Reconciliation	-\$2,660.50

**Department Reports:**

- Mark Allen – Academics/Performing and Fine Arts/University Scholars
- Eileen Bowers – Director of Office Operations
- Seth Heiland – HR
- Mark Murray – IT
- Carlos Castillo – Student Services

**Public Comments:**

## **Adjournment:**

**12. Motion:** Be it resolved that the meeting of the PA Leadership Charter School Board of Directors shall adjourn.

First: Brian Ney

Second: John Wingerter

Vote: Unanimous

**Next meeting: June 10, 2022**

**Ending Time: 2:52 PM**

**will be located at  
1332 Enterprise Drive or  
1645 West Chester Pike  
11:30 AM Executive Session  
1:00 PM Public Board Meeting  
(approximate)**

**PA Leadership Charter School Board Meeting  
Executive Session:  
February 11, 2022**

**I. PERSONNEL:**

- Genevieve Conrad—EL Fourth Grade Teacher rate change from \$49,135.10 to \$52,574.56 with appropriate benefits
- Stephanie Copenhaver—SPED Administrative Assistant from \$17 to \$18/hour with appropriate benefits
- David Gerstle—MS Social Studies Teacher rate change from \$47,703.97 to \$51,043.26 with appropriate benefits
- Michelle Gonnella—USP Front Desk Receptionist from \$14.71 to \$16/hour with appropriate benefits
- Jonathan Keyser—Help Desk Technician rate change from \$13.39 to \$16.39/hour with appropriate benefits
- Cory Packer—Fifth Grade Teacher rate change from \$52,634.74 to \$56,319.18 with appropriate benefits
- Kristina Palushaj—MS SOAR Math/Science rate change from \$46,314.54 to \$49,556.56 with appropriate benefits
- John Ryan—Facilities Manager rate change from \$83,000.32 to \$85,000 with appropriate benefits
- Ann Sevick—USP Front Desk Receptionist from \$15.01 to \$16/hour with appropriate benefits
- Beth Showell Smith—Help Desk Technician from \$16.73 to \$19.73/hour with appropriate benefits

**PREVIOUSLY HIRED:**

**HIRING AT THIS BOARD MEETING:**

- Jennifer Bathe—MS SPED Teacher, \$68,269.53 with appropriate benefits
- Kathy Chan—Video Production Specialist, \$18/hour with appropriate benefits
- Darian Fiorenza—CPFA Day Sub, \$18/hour with appropriate benefits
- Danica Fossesca—Fourth Grade Teacher, \$44,965.57 with appropriate benefits
- Bethany Gill—SS Representative-Withdrawals, \$16/hour with appropriate benefits
- Meredith Hung—USP Biology LTS, \$18/hour with appropriate benefits
- Moira (Margaret) Kelly—Westtown Front Desk Receptionist, \$16/hour with appropriate benefits
- Christopher McAlee—SS Shipping and Receiving Representative, \$16/hour with appropriate benefits
- Bryan Michaels—HS SPED Teacher, \$78,251.27 with appropriate benefits
- Kelly Moran—Second Grade Teacher, \$49,135.10 with appropriate benefits

- Sean Murray—SPED Teacher, \$44,965.57 with appropriate benefits
- Karen Nines—ES Academic Advisor, \$18/hour with appropriate benefits
- Emily Perri—First Grade Teacher, \$73,048.40 with appropriate benefits
- Kelly Snyder—Fifth Grade Teacher, \$75,605.09 with appropriate benefits
- Vicki Whisler—HS English Teacher, \$78,251.27 with appropriate benefits
- Keith Worrell—HS Science Teacher, \$56,319.18 with appropriate benefits
- Joshua Wilkins—MS Math Teacher, \$48,525.86 with appropriate benefits

**POSITION CHANGES:**

- Aysia Beatty—SS Representative-Withdrawals at \$16.48 to Administrative Assistant to Director of Student Services at \$18/hour with appropriate benefits
- Charlie Berkheimer—Maintenance Supervisor at \$31.44/hour to Facilities Manager at \$80,000 with appropriate benefits
- Linda Kinneary—Certified School Nurse at \$67,980.12 to Health Services Supervisor at \$74,000 with appropriate benefits
- Veronica Mataboni—USP ELA LTS at \$18/hour to USP ELA Teacher at \$45,351.27 with appropriate benefits
- Rachel McGowan—USP English Teacher to USP Guidance Counselor with no rate change with appropriate benefits
- Alicia Ryberg—EL Academic Advisor at \$18.54/hour to Community Resource and Homeless Liaison at \$45,000 with appropriate benefits

**NOTE:** LTS – Long Term Substitute  
 USP – University Scholars Program  
 SPED – Special Education  
 HR – Human Resources  
 HS – High School  
 MS – Middle School  
 EL – Elementary  
 PT – Part Time  
 CPFA – Center for Performing and Fine Arts

**II. LEGAL:**

**III. REAL ESTATE:**



**PA Leadership Charter School Board Meeting  
Agenda  
February 11, 2022  
1645 West Chester Pike, West Chester, PA 19382**

**Starting Time: 1:38 PM**

**Ending Time: 3:00 PM**

**Opening activities:**

1. Call to order – Chairman of the Board of Directors
2. Public Notice: Public notice was given for this meeting in accordance with Act 93 of 1998, Section 1.
3. The Board met this afternoon in Executive Session to discuss personnel, legal and real estate matters.

**Note:** All meetings are on the **second Friday of the month**. Agenda will be posted on [www.palcs.org](http://www.palcs.org) website. Locate “Organization” in the toolbar and click “School Board Meetings and Board Members.”

**Future meetings:**

- **March 11, 2022**
- **May 20, 2022**

**Roll call:**

- Tom Curyto                     present [ ] not present
- Dr. Brian Shuffler          present  not present
- Carolyn Welsh              present [ ] not present
- Dr. John Wingerter        present [ ] not present
- Gary Dougherty            present [ ] not present

**Also present regularly:**

Mark Allen, Eileen Bowers, Carlos Castillo, Jim Hanak, Meredith Heckenberger, Seth Heiland, Andrew Lehr, Roger Masch, Mark Murray

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4. Pledge of Allegiance
5. Additions, deletions or modifications to the Agenda
6. Additions, deletions or modifications to the Minutes
7. Comments from the Public will be heard after Department Reports

1. **Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the minutes from the Board of Directors meeting from November 12, 2021.

First: Gary Dougherty  
Second: Carolyn Welsh  
Vote: Unanimous

### **Fiscal Management:**

2. **Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall accept the financial report submitted by Dr. James Hanak and Roger Masch and direct the CEO to pay the bills (as the money becomes available).

First: Tom Curyto  
Second: Gary Dougherty  
Vote: Unanimous

3. **Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve a renewal for Barracuda Essentials Security Edition, with a yearly payment of \$12,852.00. Purpose is our mail spam filter for staff email. (See Attachment A).

First: John Wingerter  
Second: Gary Dougherty  
Vote: Unanimous

4. **Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve a renewal agreement with MicroFocus. Renewal includes licensing for user directory, staff email, device management software and some network related software licensing. Total cost is \$24,441.00. (See Attachment B).

First: John Wingerter  
Second: Tom Curyto  
Vote: Unanimous

5. **Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve a renewal agreement with Sophos. Renewal includes licensing for computer anti-virus software and is for three years. Total cost is \$51,874.44. (See Attachment C).

First: John Wingerter  
Second: Carolyn Welsh  
Vote: Unanimous

6. **Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve a renewal agreement Audacy. Renewal includes licensing for our digital campaign that includes search engine management, search engine optimization, social media targeted posts, over-the-top video commercials, audio commercials on fm radio and on podcasting. Total cost is \$690,726.00. (See Attachment D).

First: Carolyn Welsh

Second: Tom Curyto

Vote: Unanimous

7. **Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve an agreement with Audacy to be included in the annual fundraiser for Children’s Hospital of Philadelphia Agreement. Agreement includes mentions and an interview during the 2-day radio fundraiser. Also included is streaming and social media impressions, and various logo and signage exposure. Total cost is \$15,000.00. (See Attachment E).

First: Gary Dougherty

Second: John Wingerter

Vote: Unanimous

## **Personnel:**

8. **Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the hiring of all of the following personnel listed below:
- Jennifer Bathe—MS SPED Teacher, \$68,269.53 with appropriate benefits
  - Kathy Chan—Video Production Specialist, \$18/hour with appropriate benefits
  - Darian Fiorenza—CPFA Day Sub, \$18/hour with appropriate benefits
  - Danica Fossesca—Fourth Grade Teacher, \$44,965.57 with appropriate benefits
  - Bethany Gill—SS Representative-Withdrawals, \$16/hour with appropriate benefits
  - Meredith Hung—USP Biology LTS, \$18/hour with appropriate benefits
  - Moira (Margaret) Kelly—Westtown Front Desk Receptionist, \$16/hour with appropriate benefits
  - Christopher McAlee—SS Shipping and Receiving Representative, \$16/hour with appropriate benefits
  - Bryan Michaels—HS SPED Teacher, \$78,251.27 with appropriate benefits
  - Kelly Moran—Second Grade Teacher, \$49,135.10 with appropriate benefits
  - Sean Murray—SPED Teacher, \$44,965.57 with appropriate benefits
  - Karen Nines—ES Academic Advisor, \$18/hour with appropriate benefits
  - Emily Perri—First Grade Teacher, \$73,048.40 with appropriate benefits
  - Kelly Snyder—Fifth Grade Teacher, \$75,605.09 with appropriate benefits
  - Vicki Whisler—HS English Teacher, \$78,251.27 with appropriate benefits
  - Keith Worrell—HS Science Teacher, \$56,319.18 with appropriate benefits

- Joshua Wilkins—MS Math Teacher, \$48,525.86 with appropriate benefits

First: John Wingerter

Second: Carolyn Welsh

Vote: Unanimous

- 9. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the position changes of all of the following personnel listed below:

- Aysia Beatty—SS Representative-Withdrawals at \$16.48 to Administrative Assistant to Director of Student Services at \$18/hour with appropriate benefits
- Charlie Berkheimer—Maintenance Supervisor at \$31.44/hour to Facilities Manager at \$80,000 with appropriate benefits
- Linda Kinneary—Certified School Nurse at \$67,980.12 to Health Services Supervisor at \$74,000 with appropriate benefits
- Veronica Mataboni—USP ELA LTS at \$18/hour to USP ELA Teacher at \$45,351.27 with appropriate benefits
- Rachel McGowan—USP English Teacher to USP Guidance Counselor with no rate change with appropriate benefits
- Alicia Ryberg—EL Academic Advisor at \$18.54/hour to Community Resource and Homeless Liaison at \$45,000 with appropriate benefits

First: Gary Dougherty

Second: Tom Curyto

Vote: Unanimous

- 10. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the rate changes of all of the following personnel listed below:

- Genevieve Conrad—EL Fourth Grade Teacher rate change from \$49,135.10 to \$52,574.56 with appropriate benefits
- Stephanie Copenhaver—SPED Administrative Assistant from \$17 to \$18/hour with appropriate benefits
- David Gerstle—MS Social Studies Teacher rate change from \$47,703.97 to \$51,043.26 with appropriate benefits
- Michelle Gonnella—USP Front Desk Receptionist from \$14.71 to \$16/hour with appropriate benefits
- Jonathan Keyser—Help Desk Technician rate change from \$13.39 to \$16.39/hour with appropriate benefits
- Cory Packer—Fifth Grade Teacher rate change from \$52,634.74 to \$56,319.18 with appropriate benefits
- Kristina Palushaj—MS SOAR Math/Science rate change from \$46,314.54 to \$49,556.56 with appropriate benefits
- John Ryan—Facilities Manager rate change from \$83,000.32 to \$85,000 with appropriate benefits

- Ann Sevick—USP Front Desk Receptionist from \$15.01 to \$16/hour with appropriate benefits
- Beth Showell Smith—Help Desk Technician from \$16.73 to \$19.73/hour with appropriate benefits

First: John Wingerter  
 Second: Tom Curyto  
 Vote: Unanimous

## **Policy Issues:**

- 11. Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve the Interested Persons Transaction Policy. (See Attachment F)

First: Carolyn Welsh  
 Second: Gary Dougherty  
 Vote: Unanimous

## **Old Business:**

## **New Business:**

- 12. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the 2022-2023 School Calendar. (See attachment G)

First: Tom Curyto  
 Second: John Wingerter  
 Vote: Unanimous

- 13. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the revised PALCS Health and Safety Plan. (See attachment H)

First: Tom Curyto  
 Second: Gary Dougherty  
 Vote: Unanimous

- 14. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall create a subcommittee of the Board to assess the long term financial needs of the school and to create a policy that will effectively secure the finances of the school. That subcommittee shall include Dr. John Wingerter (Chair of the Board), Gary Dougherty, Dr. James Hanak (CEO),

Eileen Bowers (DOO), Roger Masch (Charter Choices) and others that the chairman of the board, CEO and DOO deem necessary to accomplish the goals of the committee.

First: John Wingerter  
 Second: Tom Curyto  
 Vote: Unanimous

**Special Reports:**

3,938 Students enrolled in PALCS as of Wednesday, February 9, 2022 for the 2021-2022 school year. Down from 3,978 (November 9, 2021).

**Review:**

Finances:

- a. First year of operation – \$4.5 million (included \$234,000 implementation grant from the A Department of Education)
- b. Second year of operation – \$10.5 million (included \$100,000 implementation grant from the PA Department of Education)
- c. Third year of operation – \$17 million
- d. Fourth year of operation – \$19 million
- e. Fifth year of operation – \$21.4 million
- f. Sixth year of operation – \$23.5 million
- g. Seventh year of operation – \$25.2 million
- h. Eight year of operation – \$26.1 million
- i. Ninth year of operation – \$29.1 million
- j. Tenth year of operation – \$29.7 million
- k. Eleventh year of operation – \$30.9 million
- l. Twelfth year of operation – \$30.9 million
- m. Thirteenth year of operation – \$35.2 million
- n. Fourteenth year of operation – \$42.3 million
- o. Fifteenth year of operation – \$47.2 million
- p. Sixteenth year of operation – \$54.1 million
- q. Seventeenth year of operation – \$78.2 million

School District Payments:

<b>DISTRICT BILLING</b>	
Billed through 1-31-22 for the 2021-2022 school year	<b>\$37,185,782.42</b>
<b>DISTRICT PAYMENTS AND REFUNDS</b>	
Received from Districts through 1-31-22	\$26,667,036.16
Refunded to Districts through 1-31-22	(\$30,749.49)
Received from UNIPAY through 1-31-22	<u>\$7,225,923.26</u>

<b>Total Paid through 1-31-22</b>	<b>\$33,862,209.93</b>
<b>OUTSTANDING DUE FROM DISTRICTS</b>	
Due for the 2021-2022 school year	\$3,330,689.06
Due for the 2020-2021 Reconciliation	\$55,396.84

**Department Reports:**

- Mark Allen – Academics/Performing and Fine Arts/University Scholars
- Eileen Bowers – Director of Office Operations
- Seth Heiland – HR
- Mark Murray – IT
- Carlos Castillo – Student Services

**Public Comments:**

**Adjournment:**

15. **Motion:** Be it resolved that the meeting of the PA Leadership Charter School Board of Directors shall adjourn.

First: John Wingerter  
Second: Tom Curtyo  
Vote: Unanimous

**Next meeting: March 11, 2022**

**Ending Time: 3:00 PM**

**will be located at  
1332 Enterprise Drive or  
1645 West Chester Pike  
12:00 PM Executive Session  
1:00 PM Public Board Meeting  
(approximate)**

## **PA Leadership Charter School Board Meeting Executive Session:**

### **I. PERSONNEL:**

- Rachel Laing—Kindergarten rate change from \$43,655.90 to \$46,711.81 with appropriate benefits
- Hannah Lewis—MS English Teacher rate change from \$56,319.18 to \$60,554.05 with appropriate benefits
- Megan Martin—MS ELA rate change from \$49,135.10 to \$52,574.56 with appropriate benefits
- Julianna Maurer—MS SPED Teacher rate change from \$47,703.97 to \$51,043.26 with appropriate benefits

### **PREVIOUSLY HIRED:**

### **HIRING AT THIS BOARD MEETING:**

- Lauren Case—MS Math Interventionist, \$58,290.35 with appropriate benefits
- Tammara Clevenger—HS SPED Teacher, \$46,711.86 with appropriate benefits
- Lee Ann Cognetti—USP English Teacher, \$58,357.00 with appropriate benefits
- Pamela Craig—ES Fifth Grade Teacher, \$78,251.27 with appropriate benefits
- Paula DiPaolo—MS Math Interventionist, \$78,251.16 with appropriate benefits
- Melissa Drueding—ES Administrative Assistant, \$18/hour with appropriate benefits
- Todd Fausnacht—MS ELA Teacher, \$52,574.60 with appropriate benefits
- Maria Fraser—SS Representative-Admissions, \$16/hour with appropriate benefits
- Jennifer Homka—MS SPED, \$48,113.16 with appropriate benefits
- Nabila (Nina) Ighemat—MS French Teacher, \$49,556.56 with appropriate benefits
- Veronica Mattaboni—USP LTS, \$18/hour with appropriate benefits
- Marjorie Mattes—Temporary Clerical Support for Health Services, \$16.50/hour with appropriate benefits
- Aileen McCulloch—CPFA Day Sub, \$18/hour with appropriate benefits
- Victoria McGoldrick—ES Third Grade Teacher, \$51,043.20 with appropriate benefits
- Daniel Reiher—HS Social Studies Teacher, \$46,711.86 with appropriate benefits
- Connor Sensenig—HS ELA Teacher, \$44,965.57 with appropriate benefits
- Lakyn Sessa—ES Kindergarten Teacher, \$42,384.42 with appropriate benefits
- Kaitlyn Totman—MS Academic Advisor, \$18/hour with appropriate benefits
- Ryan Tuerk—CPFA Day Sub, \$18/hour with appropriate benefits
- Veena Viswanathan—SS Representative-Testing, \$16/hour with appropriate benefits



## **POSITION CHANGES:**

- Julie Crisafio—HS French Teacher change to MS French Teacher with no rate change with appropriate benefits
- Darlene Garrow—MS SPED Teacher at \$64,939.76 change to ES Assistant Principal at \$80,000 with appropriate benefits
- Meredith Heckenberger—CEO Assistant at \$20.60 change to Child Accounting Manager at \$55,000 with appropriate benefits
- David Juliano—HS Social Studies Teacher at \$67,537.34 change to HS Assistant Principal at \$80,000 with appropriate benefits
- Shane Kelly—Shipping & Receiving/Division at \$14.50/hour change to ES Academic Advisor at \$18/hour with appropriate benefits
- Jessica Moose—Community Resource & Homeless Liaison at \$46,349.94 change to HS Guidance Counselor at \$48,113.16 with appropriate benefits
- Jennifer Ware—SS Administrative Assistant at \$18.54/hour change to SS Supervisor of Standardized Testing at \$55,000 with appropriate benefits

**NOTE:** LTS – Long Term Substitute  
USP – University Scholars Program  
SPED – Special Education  
HR – Human Resources  
HS – High School  
MS – Middle School  
EL – Elementary  
PT – Part Time  
CPFA – Center for Performing and Fine Arts

## **II. LEGAL:**

## **III. REAL ESTATE:**

**PA Leadership Charter School Board Meeting  
Agenda  
November 12, 2021 – 1:00 PM  
1332 Enterprise Drive, West Chester, PA 19380**

**Starting Time: 1:32 PM**

**Ending Time: 3:29 PM**

**Opening activities:**

1. Call to order – Chairman of the Board of Directors
2. Public Notice: Public notice was given for this meeting in accordance with Act 93 of 1998, Section 1.
3. The Board met this afternoon in Executive Session to discuss personnel, legal and real estate matters.

**Note:** All meetings are on the **second Friday of the month**. Agenda will be posted on [www.palcs.org](http://www.palcs.org) website. Locate “Organization” in the toolbar and click “School Board Meetings and Board Members.”

**Future meetings:**

- **January 14, 2022**
- **March 11, 2022**
- **May 20, 2022**

**Roll call:**

- Tom Curyto                            [ ] present [X] not present
- Dr. Brian Shuffler                [X] present [ ] not present
- Carolyn Welsh                     [X] present [ ] not present
- Dr. John Wingerter               [X] present [ ] not present
- Gary Dougherty                   [X] present [ ] not present

**Also present regularly:**

Mark Allen, Eileen Bowers, Carlos Castillo, Jim Hanak, Meredith Heckenberger,  
Seth Heiland, Andrew Lehr, Roger Masch, Mark Murray

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4. Pledge of Allegiance
5. Additions, deletions or modifications to the Agenda
6. Additions, deletions or modifications to the Minutes
7. Comments from the Public will be heard after Department Reports

- 1. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the minutes from the Board of Directors meeting from September 17, 2021.

First: Gary Dougherty  
Second: Brian Shuffler  
Vote: Unanimous

### **Fiscal Management:**

- 2. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall accept the financial report submitted by Dr. James Hanak and Roger Masch and direct the CEO to pay the bills (as the money becomes available).

First: Carolyn Welsh  
Second: Gary Dougherty  
Vote: Unanimous

- 3. Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve the changes to the Academic Leadership and Director Benefits plan allowing nutritional supplements to be reimbursed as part of the \$300 monthly allowance, regardless of where the supplements are purchased unless purchased through a 3rd party that may constitute a conflict of interest.

\*Nutritional supplements purchased from August 12th, 2021 will be eligible for reimbursement approval within this board motion. (See Attachment A)

First: Carolyn Welsh  
Second: Gary Dougherty  
Vote: Unanimous

### **Personnel:**

- 4. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the following new position:
  - Temporary Clerical Support for Health Services

First: Gary Dougherty  
Second: John Wingerter  
Vote: Unanimous

- 5. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the hiring of all of the following personnel listed below:
  - Lauren Case—MS Math Interventionist, \$58,290.35 with appropriate benefits

- Tammara Clevenger—HS SPED Teacher, \$46,711.86 with appropriate benefits
- Lee Ann Cognetti—USP English Teacher, \$58,357.00 with appropriate benefits
- Pamela Craig—ES Fifth Grade Teacher, \$78,251.27 with appropriate benefits
- Paula DiPaolo—MS Math Interventionist, \$78,251.16 with appropriate benefits
- Melissa Drueding—ES Administrative Assistant, \$18/hour with appropriate benefits
- Todd Fausnacht—MS ELA Teacher, \$52,574.60 with appropriate benefits
- Maria Fraser—SS Representative-Admissions, \$16/hour with appropriate benefits
- Jennifer Homka—MS SPED, \$48,113.16 with appropriate benefits
- Nabila (Nina) Ighemat—MS French Teacher, \$49,556.56 with appropriate benefits
- Veronica Mattaboni—USP LTS, \$18/hour with appropriate benefits
- Marjorie Mattes—Temporary Clerical Support for Health Services, \$16.50/hour with appropriate benefits
- Aileen McCulloch—CPFA Day Sub, \$18/hour with appropriate benefits
- Victoria McGoldrick—ES Third Grade Teacher, \$51,043.20 with appropriate benefits
- Daniel Reiher—HS Social Studies Teacher, \$46,711.86 with appropriate benefits
- Connor Sensenig—HS ELA Teacher, \$44,965.57 with appropriate benefits
- Lakyn Sessa—ES Kindergarten Teacher, \$42,384.42 with appropriate benefits
- Kaitlyn Totman—MS Academic Advisor, \$18/hour with appropriate benefits
- Ryan Tuerk—CPFA Day Sub, \$18/hour with appropriate benefits
- Veena Viswanathan—SS Representative-Testing, \$16/hour with appropriate benefits

First: Carolyn Welsh

Second: Gary Dougherty

Vote: Unanimous

- 6. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the position changes of all of the following personnel listed below:
- Julie Crisafio—HS French Teacher change to MS French Teacher with no rate change with appropriate benefits
  - Darlene Garrow—MS SPED Teacher at \$64,939.76 change to ES Assistant Principal at \$80,000 with appropriate benefits

- Meredith Heckenberger—CEO Assistant at \$20.60 change to Child Accounting Manager at \$55,000 with appropriate benefits
- David Juliano—HS Social Studies Teacher at \$67,537.34 change to HS Assistant Principal at \$80,000 with appropriate benefits
- Shane Kelly—Shipping & Receiving/Division at \$14.50/hour change to ES Academic Advisor at \$18/hour with appropriate benefits
- Jessica Moose—Community Resource & Homeless Liaison at \$46,349.94 change to HS Guidance Counselor at \$48,113.16 with appropriate benefits
- Jennifer Ware—SS Administrative Assistant at \$18.54/hour change to SS Supervisor of Standardized Testing at \$55,000 with appropriate benefits

First: Brian Shuffler  
 Second: Carolyn Welsh  
 Vote: Unanimous

- 7. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the rate changes of all of the following personnel listed below:
- Rachel Laing—Kindergarten rate change from \$43,655.90 to \$46,711.81 with appropriate benefits
  - Hannah Lewis—MS English Teacher rate change from \$56,319.18 to \$60,554.05 with appropriate benefits
  - Megan Martin—MS ELA rate change from \$49,135.10 to \$52,574.56 with appropriate benefits
  - Julianna Maurer—MS SPED Teacher rate change from \$47,703.97 to \$51,043.26 with appropriate benefits

First: Gary Dougherty  
 Second: Brian Shuffler  
 Vote: Unanimous

Note: These rate changes are reflective of degree advancements.

**Policy Issues:**

- 8. Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve the changes to the PALCS Title IX Policy. (See Attachment B)

First: Carolyn Welsh  
 Second: Brian Shuffler  
 Vote: Unanimous

9. **Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the Core Literature Approval Policy. (See attachment C)

First: Gary Dougherty  
Second: John Wingerter  
Vote: Unanimous

## **Old Business:**

## **New Business:**

## **Special Reports:**

3,978 Students enrolled in PALCS as of Tuesday, November 9, 2021 for the 2021-2022 school year. Down from 4,096 (September 15, 2021).

## **Review:**

### Finances:

- a. First year of operation – \$4.5 million (included \$234,000 implementation grant from the A Department of Education)
- b. Second year of operation – \$10.5 million (included \$100,000 implementation grant from the PA Department of Education)
- c. Third year of operation – \$17 million
- d. Fourth year of operation – \$19 million
- e. Fifth year of operation – \$21.4 million
- f. Sixth year of operation – \$23.5 million
- g. Seventh year of operation – \$25.2 million
- h. Eight year of operation – \$26.1 million
- i. Ninth year of operation – \$29.1 million
- j. Tenth year of operation – \$29.7 million
- k. Eleventh year of operation – \$30.9 million
- l. Twelfth year of operation – \$30.9 million
- m. Thirteenth year of operation – \$35.2 million
- n. Fourteenth year of operation – \$42.3 million
- o. Fifteenth year of operation – \$47.2 million
- p. Sixteenth year of operation – \$54.1 million
- q. Seventeenth year of operation – \$78.2 million

School District Payments:

Billed through October for the 2021-2022 school year	\$21,211,943.38
Received from Districts through 10/31/21	\$13,084,266.69
Refunded to Districts through 10/31/21	\$0
Received from UNIPAY through 10/31/21	<u>\$3,633,631.00</u>
TOTAL of B	\$16,717,897.69
Due for the 2021-2022 school year	\$4,287,017.91
Due for the 2020-2021 Reconciliation	\$383,372.19
Due for the 2019-2020 Reconciliation	(\$33,198.64)
Due for the 2018-2019 Reconciliation	(\$3,677.42)
Due for the 2017-2018 Reconciliation	(12,679.73)
Due for the 2016-2017 Reconciliation	(12,679.73)
Due for the 2015-2016 Reconciliation	\$0
Due for the 2014-2015 Reconciliation	\$0
Due for the 2013-2014 Reconciliation	\$0

**Department Reports:**

- Mark Allen – Academics/Performing and Fine Arts/University Scholars
- Eileen Bowers – Director of Office Operations
- Seth Heiland – HR
- Mark Murray – IT
- Carlos Castillo – Student Services

**Public Comments:**

**Adjournment:**

10. **Motion:** Be it resolved that the meeting of the PA Leadership Charter School Board of Directors shall adjourn.

First: Carolyn Welsh  
Second: Brian Shuffler  
Vote: Unanimous

**Next meeting: January 14, 2022**

**Ending Time: 3:29 PM**

**will be located at  
1332 Enterprise Drive or  
1645 West Chester Pike  
12:00 PM Executive Session  
1:00 PM Public Board Meeting  
(approximate)**

# **PA Leadership Charter School Board Meeting Executive Session:**

## **I. PERSONNEL:**

- Danielle Caratello—ES SPED Teacher rate change from \$46,314.54 to \$49,556.56 with appropriate benefits
- John Flagler—HS ELA Teacher rate change from \$49,135.10 to \$52,574.56 with appropriate benefits
- Tia Fraser—Pittsburgh Front Desk Receptionist rate change from \$14/hour to \$16/hour with appropriate benefits
- Jenna Grauer—HS Administrative Assistant rate change from \$16.83/hour to \$18/hour with appropriate benefits
- Tammy Hartzel—Certified School Nurse rate change from \$56,100 to \$67,100 with appropriate benefits
- Linda Kinneary—Certified School Nurse rate change from \$55,000 to \$66,000 with appropriate benefits
- Tishiema Lacy—MS Administrative Assistant rate change from \$16.83/hour to \$18/hour with appropriate benefits
- Rachel Laing—Kindergarten Teacher rate change from \$43,655.90 to \$46,711.81 with appropriate benefits
- Hannah Lewis—MS English Teacher rate change from \$56,319.18 to \$60,554.05 with appropriate benefits
- Megan Martin—MS ELA rate change from \$49,135.10 to \$52,574.56 with appropriate benefits
- Julianna Maurer—MS SPED Teacher rate change from \$47,703.97 to \$51,043.26 with appropriate benefits
- Alexander Rausch—MS Assistant Principal rate change from \$70,000.06 to \$80,000 with appropriate benefits
- Zofia Swiatek—Supervisor of Federal Programs rate change from \$78,000 to \$85,000 with appropriate benefits
- Ben Walton—HS English Teacher rate change from \$73,132.02 to \$78,251.27 with appropriate benefits
- Kristin Waltz—HS Social Studies Teacher rate change from \$47,703.97 to \$51,043.26 with appropriate benefits

## **PREVIOUSLY HIRED:**

## **HIRING AT THIS BOARD MEETING:**

- Dea Bassetti—MS Math Interventionist, \$62,442.08 with appropriate benefits
- Aysia Beatty—SS Rep.-Withdrawals, \$16/hour with appropriate benefits



- Genevieve Conrad—Fourth Grade Teacher, \$49,135.06 with appropriate benefits
- Maria Costanzi—MS Math Interventionist, \$43,655.82 with appropriate benefits
- Morgan Dobson—HR Administrative Assistant, \$18/hour with appropriate benefits
- Reilly Dougherty—First Grade Teacher, \$42,384.37 with appropriate benefits
- Thomas Doyle—HS SPED Teacher, \$45,351.28 with appropriate benefits
- Caitlin Dukes—MS SPED Teacher, \$73,048.00 with appropriate benefits
- Zoey Feeser—SS Rep.-Testing, \$16/hour with appropriate benefits
- Tia Fraser—Pittsburgh Front Desk Receptionist, \$14/hour with appropriate benefits
- Sophia Gore—CPFA Theater Teacher, \$42,384.37 with appropriate benefits
- Jennifer Grablewski—Certified School Nurse \$55,000 with appropriate benefits
- Elizabeth Hammond—SS Representative-Admissions, \$16/hour with appropriate benefits
- Nicholas Harmantzis—CPFA Music Teacher, \$49,981.63 with appropriate benefits
- Timothy Inners—HS Biology Teacher, \$42,384.42 with appropriate benefits
- Josh Lafferty—SS Rep.-Academic Records, \$16/hour with appropriate benefits
- Anna Leidner—ES Third Grade Teacher, \$42,384.37 with appropriate benefits
- Mary Letukas—MS Math Interventionist, \$60,971.37 with appropriate benefits
- Tabitha Loftus—ES Third Grade Teacher, \$45,351.27 with appropriate benefits
- Kelsey Mahoney—MS Math Teacher, \$54,414.66 with appropriate benefits
- Lauren Mazzio—CPFA Guidance Counselor, \$45,351.28 with appropriate benefits
- Samuel Morris—USP Social Studies, \$42,384.37 with appropriate benefits
- Catherine Nettles—WC Front Desk Receptionist, \$16/hour with appropriate benefits
- Leslie Paul—First Grade Teacher, \$52,574.56 with appropriate benefits
- Nicolette Peccina—First Grade Teacher, \$42,384.37 with appropriate benefits
- Nicole Pica—HS Science Teacher, \$46,711.81 with appropriate benefits
- Sharon Plichta—USP Classroom Facilitator, \$18/hour with appropriate benefits
- Bobbi Portnoy—USP Math Teacher, \$78,251.16 with appropriate benefits
- Kelley Renfer—SPED Assistant IEP Compliance Monitor, \$55,000 with appropriate benefits
- David Rue—MS Math Teacher, \$45,351.28 with appropriate benefits
- Sophia Severson—CPFA Administrative Assistant, \$18/hour with appropriate benefits
- Taylor Sforza—First Grade Teacher, \$42,384.37 with appropriate benefits
- Shannon Staszak—Fourth Grade Teacher, \$64,393.68 with appropriate benefits
- Caroline Stiles—UPS Classroom Facilitator, \$18/hour with appropriate benefits
- Emily Stiles—UPS Classroom Facilitator, \$18/hour with appropriate benefits
- Dean Velez—LTS-CPFA Art Teacher, \$18/hour with appropriate benefits
- Shane Waltz—HS Academic Advisor, \$18/hour with appropriate benefits
- Ryan Wentzel—USP Social Studies Teacher, \$42,384.37 with appropriate benefits

### **POSITION CHANGES:**

- Cara Atmajian—HS Assistant Principal at \$73,149.96 change to Curriculum Supervisor at \$85,000 with appropriate benefits
- Caitlin Burns—MS Math Interventionist change to MS Math Teacher with no rate change
- Patricia Calvitto—CPFA Guidance Counselor change to ES Guidance Counselor with no rate change
- Linda Cerynik—USP Classroom Facilitator at \$18/hour change to USP English Teacher at \$43,655.82 with appropriate benefits
- Michelle Costello—IEP Coordinator at \$69,656.34 change to Assistant SPED Supervisor at \$75,000 with appropriate benefits
- Jonathan Council—Video Specialist at \$18.36/hour change to CPFA Film and Media Teacher at \$46,711.81 with appropriate benefits
- Julie Crisafio—MS French Teacher to HS French Teacher with no rate change
- Christopher Difernando—IT Systems Administrator at \$52,055.64 change to Systems Engineer at \$62,000 with appropriate benefits
- Darlene Garrow—MS SPED Teacher at \$64,939.76 change to ES Assistant Principal at \$80,000 with appropriate benefits
- Laura Gensamer—SS Rep.-Orientations at \$17.09/hour change to SS Orientation Specialist at \$23/hour with appropriate benefits
- Brett Glassman—Help Desk Technician at \$13/hour change to Desktop Support Technician at \$16.85/hour with appropriate benefits
- David Juliano—HS Social Studies Teacher at \$67,537.34 change to HS Assistant Principal at \$80,000 with appropriate benefits
- Julie Kaplan—USP AP Psychology Teacher change to HS Social Studies Teacher with no rate change
- Jessica Moose—ES Academic Advisor at \$18/hour change to Community Resource and Homeless Liaison at \$45,000 with appropriate benefits
- Ashley Murphy—HS SPED Teacher at \$54,414.66 change to SPED IEP Coordinator at \$65,000 with appropriate benefits
- Alex (Douglas) Orr—SS Rep.-Admissions at \$16/hour change to SS Rep.-Orientations at \$16.50/hour with appropriate benefits
- Victoria Pizarro—HR Administrative Assistant at \$16.50/hour change to HR Generalist-Recruiting and Payroll at \$23/hour with appropriate benefits
- Nathan Reiher—IT Desktop Support Tech at \$19.11 change to IT Sr. Support Technician at \$20.20/hour with appropriate benefits
- Giana Rodkey—SS Rep.-Testing at \$16.73 change to SS Records Specialist at \$23/hour with appropriate benefits
- Carolyn Rogers—SS Rep change to SS Rep.-Orientations with no rate change
- Jennifer Schelling—ES Instructional Coach change to ES Data and Interventionist Specialist with no rate change

- Joanne Stellabote—SS Rep.-Admissions at \$22.25/hour change to SS Admissions Specialist at \$23/hour with appropriate benefits
- Christina Strellec—MS SPED Teacher change to MS SPED Life Skills Teacher with no rate change
- Jennifer Ware—SS Rep.-Admissions at \$16.50/hour change to SS Administrative Assistant at \$18/hour with appropriate benefits

**NOTE:** LTS – Long Term Substitute  
USP – University Scholars Program  
SPED – Special Education  
HR – Human Resources  
HS – High School  
MS – Middle School  
EL – Elementary  
PT – Part Time

**II. LEGAL:**

**III. REAL ESTATE:**

**PA Leadership Charter School Board Meeting  
Agenda  
September 17, 2021 – 1:00 PM  
1332 Enterprise Drive, West Chester, PA 19380**

**Starting Time: 1:20 PM**

**Ending Time: 2:55 PM**

**Opening activities:**

1. Call to order – Chairman of the Board of Directors
2. Public Notice: Public notice was given for this meeting in accordance with Act 93 of 1998, Section 1.
3. The Board met this afternoon in Executive Session to discuss personnel, legal and real estate matters.

**Note:** All meetings are on the **second Friday of the month**. Agenda will be posted on [www.palcs.org](http://www.palcs.org) website. Locate “Organization” in the toolbar and click “School Board Meetings and Board Members.”

**Future meetings:**

- **November 12, 2021**
- **January 14, 2022**
- **March 11, 2022**
- **May 20, 2022**

**Roll call:**

- Tom Curyto                             present [ ] not present
- Dr. Brian Shuffler                 present  not present
- Carolyn Welsh                       present [ ] not present
- Dr. John Wingerter                present [ ] not present
- Gary Dougherty                     present [ ] not present

**Also present regularly:**

Mark Allen, Eileen Bowers, Carlos Castillo, Jim Hanak, Meredith Heckenberger,  
Seth Heiland, Andrew Lehr, Roger Masch, Mark Murray

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4. Pledge of Allegiance
5. Additions, deletions or modifications to the Agenda
6. Additions, deletions or modifications to the Minutes
7. Comments from the Public will be heard after Department Reports

1. **Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the minutes from the Board of Directors meeting from May 14, 2021.

First: Carolyn Welsh

Second: Tom Curyto

Vote: Unanimous

## **Fiscal Management:**

2. **Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall accept the financial report submitted by Dr. James Hanak and Roger Masch and direct the CEO to pay the bills (as the money becomes available).

First: Gary Dougherty

Second: Tom Curyto

Vote: Unanimous

3. **Motion:** Be it resolved that the PA Leadership Charter School Board of Directors provide the following increases in compensation:

- For all non-instructional staff, a raise of 3% (unless included in the following categories)
- For all Managers and Supervisors, a raise of \$3,000 (unless included in the following categories)
- For the Academic Leadership Team, a raise of \$5,000 (unless included in the following categories)
- For all Directors, a raise of \$6,000 (unless included in the following categories)
- For the Director of Human Resources, a raise of \$8,000
- For the CEO, the changes in his new contract – separate motion

These changes will be effective as of June 28, 2021 (the beginning of a pay period)

First: Carolyn Welsh

Second: Gary Dougherty

Vote: Unanimous

4. **Motion:** Be it resolved that the PA Leadership Charter School Board of Directors approve the allocation of the General Fund Balance as follows:

- \$9,300,000 is committed for future operating costs,
- \$4,500,000 is committed to future costs associated with the increasing costs of the PSERS retirement program,
- \$23,000,000 is committed to future costs associated with interruptions in funding as a result of timing issues, or change in law or regulation, or for whatever cause, in the school's monthly per-student subsidy funding,

- \$6,000,000 is committed to future costs of real estate acquisition.
  - The total commitment herein amounts to \$42,800,000.
- \*This was approved via email on 7/7/21

First: Gary Dougherty  
Second: Tom Curyto  
Vote: Unanimous

5. **Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve a lease schedule on a Master Lease Line of Credit with HP Financial Services for the amount of \$145,791.20 term of 3 years, rate of 4.73%, with a monthly payment of \$4351.87. The purpose of this lease is for computer hardware for the new building and computer upgrades for staff. Lease number is 17. (See Attachment A for lease documents).

First: Carolyn Welsh  
Second: Tom Curyto  
Vote: Unanimous

6. **Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve a lease schedule on a Master Lease Line of Credit with HP Financial Services for the amount of \$36,098.00 term of 3 years, rate of 4.73%, with a monthly payment of \$1,077.53. The purpose of this lease is for computer hardware for IT infrastructure hardware. Lease number is 18. (See Attachment B for lease documents).

First: Carolyn Welsh  
Second: Tom Curyto  
Vote: Unanimous

7. **Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve a lease schedule on a Master Lease Line of Credit with HP Financial Services for the amount of \$32,510.73 term of 3 years, rate of 4.73%, with a monthly payment of \$970.45. The purpose of this lease is for wireless network equipment for our new building. Lease number is 19. (See Attachment C for lease documents).

First: Carolyn Welsh  
Second: Tom Curyto  
Vote: Unanimous

8. **Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve a lease schedule on a Master Lease Line of Credit with HP Financial Services for the amount of \$663,399.50 term of 3 years, rate of 4.73%, with a monthly payment of \$19,802.48. The purpose of this lease is for student computer hardware. Lease number is 20. (See Attachment D for lease documents).

First: Carolyn Welsh

Second: Tom Curyto

Vote: Unanimous

9. **Motion:** Be it resolved the PA Leadership Charter School Board of Directors shall approve a Consulting Agreement with Agentis Technologies for 1 year at an hourly rate of \$140.00 for a total of 5,400 hours totalling \$756,000 to be paid on a monthly basis. As per the agreement, Agentis will design, develop, test and implement software enhancement to our school's learning content management system. Agreement runs from July 1, 2021 to June 30, 2022. (See Attachment E).

First: Tom Curyto

Second: Gary Dougherty

Vote: Unanimous

## **Personnel:**

10. **Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the following new positions:

- Assistant Supervisor of SPED
- Assistant IEP Compliance Monitor
- SS Records Specialist
- HR Generalist-Recruiting and Payroll

First: Carolyn Welsh

Second: Gary Dougherty

Vote: Unanimous

11. **Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the hiring of all of the following personnel listed below:

- Dea Bassetti—MS Math Interventionist, \$62,442.08 with appropriate benefits
- Aysia Beatty—SS Rep.-Withdrawals, \$16/hour with appropriate benefits
- Genevieve Conrad—Fourth Grade Teacher, \$49,135.06 with appropriate benefits
- Maria Costanzi—MS Math Interventionist, \$43,655.82 with appropriate benefits
- Morgan Dobson—HR Administrative Assistant, \$18/hour with appropriate benefits
- Reilly Dougherty—First Grade Teacher, \$42,384.37 with appropriate benefits

- Thomas Doyle—HS SPED Teacher, \$45,351.28 with appropriate benefits
- Caitlin Dukes—MS SPED Teacher, \$73,048.00 with appropriate benefits
- Zoey Feeser—SS Rep.-Testing, \$16/hour with appropriate benefits
- Tia Fraser—Pittsburgh Front Desk Receptionist, \$14/hour with appropriate benefits
- Sophia Gore—CPFA Theater Teacher, \$42,384.37 with appropriate benefits
- Jennifer Grablewski—Certified School Nurse \$55,000 with appropriate benefits
- Elizabeth Hammond—SS Representative-Admissions, \$16/hour with appropriate benefits
- Nicholas Harmantzis—CPFA Music Teacher, \$49,981.63 with appropriate benefits
- Timothy Inners—HS Biology Teacher, \$42,384.42 with appropriate benefits
- Josh Lafferty—SS Rep.-Academic Records, \$16/hour with appropriate benefits
- Anna Leidner—ES Third Grade Teacher, \$42,384.37 with appropriate benefits
- Mary Letukas—MS Math Interventionist, \$60,971.37 with appropriate benefits
- Tabitha Loftus—ES Third Grade Teacher, \$45,351.27 with appropriate benefits
- Kelsey Mahoney—MS Math Teacher, \$54,414.66 with appropriate benefits
- Lauren Mazzio—CPFA Guidance Counselor, \$45,351.28 with appropriate benefits
- Samuel Morris—USP Social Studies, \$42,384.37 with appropriate benefits
- Catherine Nettles—WC Front Desk Receptionist, \$16/hour with appropriate benefits
- Leslie Paul—First Grade Teacher, \$52,574.56 with appropriate benefits
- Nicolette Peccina—First Grade Teacher, \$42,384.37 with appropriate benefits
- Nicole Pica—HS Science Teacher, \$46,711.81 with appropriate benefits
- Sharon Plichta—USP Classroom Facilitator, \$18/hour with appropriate benefits
- Bobbi Portnoy—USP Math Teacher, \$78,251.16 with appropriate benefits
- Kelley Renfer—SPED Assistant IEP Compliance Monitor, \$55,000 with appropriate benefits
- David Rue—MS Math Teacher, \$45,351.28 with appropriate benefits
- Sophia Severson—CPFA Administrative Assistant, \$18/hour with appropriate benefits
- Taylor Sforza—First Grade Teacher, \$42,384.37 with appropriate benefits
- Shannon Staszak—Fourth Grade Teacher, \$64,393.68 with appropriate benefits
- Caroline Stiles—UPS Classroom Facilitator, \$18/hour with appropriate benefits
- Emily Stiles—UPS Classroom Facilitator, \$18/hour with appropriate benefits



- Dean Velez—LTS-CPFA Art Teacher, \$18/hour with appropriate benefits
- Shane Waltz—HS Academic Advisor, \$18/hour with appropriate benefits
- Ryan Wentzel—USP Social Studies Teacher, \$42,384.37 with appropriate benefits

First: Gary Dougherty

Second: Tom Curyto

Vote: Unanimous

**12. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the position changes of all of the following personnel listed below:

- Cara Atmajian—HS Assistant Principal at \$73,149.96 change to Curriculum Supervisor at \$85,000 with appropriate benefits
- Caitlin Burns—MS Math Interventionist change to MS Math Teacher with no rate change
- Patricia Calvitto—CPFA Guidance Counselor change to ES Guidance Counselor with no rate change
- Linda Cerynik—USP Classroom Facilitator at \$18/hour change to USP English Teacher at \$43,655.82 with appropriate benefits
- Michelle Costello—IEP Coordinator at \$69,656.34 change to Assistant SPED Supervisor at \$75,000 with appropriate benefits
- Jonathan Council—Video Specialist at \$18.36/hour change to CPFA Film and Media Teacher at \$46,711.81 with appropriate benefits
- Julie Crisafio—MS French Teacher to HS French Teacher with no rate change
- Christopher Difernando—IT Systems Administrator at \$52,055.64 change to Systems Engineer at \$62,000 with appropriate benefits
- Darlene Garrow—MS SPED Teacher at \$64,939.76 change to ES Assistant Principal at \$80,000 with appropriate benefits
- Laura Gensamer—SS Rep.-Orientations at \$17.09/hour change to SS Orientation Specialist at \$23/hour with appropriate benefits
- Brett Glassman—Help Desk Technician at \$13/hour change to Desktop Support Technician at \$16.85/hour with appropriate benefits
- Jennifer Hughes—Child Accounting Associate at \$21/hour change to Child Accounting Specialist at \$23/hour with appropriate benefits
- David Juliano—HS Social Studies Teacher at \$67,537.34 change to HS Assistant Principal at \$80,000 with appropriate benefits
- Julie Kaplan—USP AP Psychology Teacher change to HS Social Studies Teacher with no rate change
- Jessica Moose—ES Academic Advisor at \$18/hour change to Community Resource and Homeless Liaison at \$45,000 with appropriate benefits
- Ashley Murphy—HS SPED Teacher at \$54,414.66 change to SPED IEP Coordinator at \$65,000 with appropriate benefits

- Alex (Douglas) Orr—SS Rep.-Admissions at \$16/hour change to SS Rep.-Orientations at \$16.50/hour with appropriate benefits
- Victoria Pizarro—HR Administrative Assistant at \$16.50/hour change to HR Generalist-Recruiting and Payroll at \$23/hour with appropriate benefits
- Nathan Reiher—IT Desktop Support Tech at \$19.11 change to IT Sr. Support Technician at \$20.20/hour with appropriate benefits
- Giana Rodkey—SS Rep.-Testing at \$16.73 change to SS Records Specialist at \$23/hour with appropriate benefits
- Carolyn Rogers—SS Rep change to SS Rep. Orientations with no rate change
- Jennifer Schelling—ES Instructional Coach change to ES Data and Interventionist Specialist with no rate change
- Joanne Stellabote—SS Rep.-Admissions at \$22.25/hour change to SS Admissions Specialist at \$23/hour with appropriate benefits
- Christina Strellec—MS SPED Teacher change to MS SPED Life Skills Teacher with no rate change
- Jennifer Ware—SS Rep.-Admissions at \$16.50/hour change to SS Administrative Assistant at \$18/hour with appropriate benefits

First: Carolyn Welsh

Second: Tom Curyto

Vote: Unanimous

**13. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the rate changes of all of the following personnel listed below:

- Danielle Caratello—ES SPED Teacher rate change from \$46,314.54 to \$49,556.56 with appropriate benefits
- John Flagler—HS ELA Teacher rate change from \$49,135.10 to \$52,574.56 with appropriate benefits
- Tia Fraser—Pittsburgh Front Desk Receptionist rate change from \$14/hour to \$16/hour with appropriate benefits
- Jenna Grauer—HS Administrative Assistant rate change from \$16.83/hour to \$18/hour with appropriate benefits
- Tammy Hartzel—Certified School Nurse rate change from \$56,100 to \$67,100 with appropriate benefits
- Linda Kinneary—Certified School Nurse rate change from \$55,000 to \$66,000 with appropriate benefits
- Tishiema Lacy—MS Administrative Assistant rate change from \$16.83/hour to \$18/hour with appropriate benefits
- Rachel Laing—Kindergarten Teacher rate change from \$43,655.90 to \$46,711.81 with appropriate benefits
- Hannah Lewis—MS English Teacher rate change from \$56,319.18 to \$60,554.05 with appropriate benefits

- Megan Martin—MS ELA rate change from \$49,135.10 to \$52,574.56 with appropriate benefits
- Julianna Maurer—MS SPED Teacher rate change from \$47,703.97 to \$51,043.26 with appropriate benefits
- Alexander Rausch—MS Assistant Principal rate change from \$70,000.06 to \$80,000 with appropriate benefits
- Zofia Swiatek—Supervisor of Federal Programs rate change from \$78,000 to \$85,000 with appropriate benefits
- Ben Walton—HS English Teacher rate change from \$73,132.02 to \$78,251.27 with appropriate benefits
- Kristin Waltz—HS Social Studies Teacher rate change from \$47,703.97 to \$51,043.26 with appropriate benefits

First: Tom Curyto  
 Second: Carolyn Welsh  
 Vote: Unanimous

**Policy Issues:**

- 14. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the updated Health and Safety Plan for Pennsylvania Leadership Charter School (See Attachments F).

First: Gary Dougherty  
 Second: Carolyn Welsh  
 Vote: Unanimous

- 15. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the Act 66 Student Grade Level Retainment Policy. (See Attachment G).

First: Tom Curyto  
 Second: Gary Dougherty  
 Vote: Unanimous

**Old Business:**

**New Business:**

- 16. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors approve the contract with Dr. James Hanak (See Attachment J). This contract takes the place of the previous contract between Dr. Hanak and PALCS that expires on September 26, 2021.

First: Gary Dougherty  
Second: Tom Curyto  
Vote: Unanimous

Note: the new contract will be effective June 8, 2021 to coincide with the additional compensation for non-instructional staff that is being approved at this meeting (September 17, 2021)

- 17. Motion:** Be it resolved that the PALCS Board of Directors approve the pause in enrollments for Middle School (6,7 & 8th grades). This pause shall not affect students who have already been scheduled for an orientation. All other applicants shall be placed on a waiting list and be subject to a lottery process to fill any new available seats. This pause shall begin at 6:00 pm Monday, September 20, 2021.

First: Carolyn Welsh  
Second: Tom Curyto  
Vote: Unanimous

- 18. Motion:** Be it resolved that the PA Leadership Charter School Board of Directors shall approve the lease between PALCS and Friends of PALCS affiliate for the property located at 1645 West Chester Pike, Westtown Township. (See Attachment H).

First: Gary Dougherty  
Second: John Wingerter  
Vote: Unanimous

- 19. Motion:** Be it resolved that the Pennsylvania Leadership Charter School Board of Directors enter into an agreement with Saxton and Stump legal team to provide council on compensation and policy issues for PALCS (See Attachment I).

First: Tom Curyto  
Second: Carolyn Welsh  
Vote: Unanimous

- 20. Motion:** Be it resolved that the Pennsylvania Leadership Charter School Board of Directors approve the resolution between PA Leadership Charter School and Chester Upland School District. (See Attachment K).

First: Gary Dougherty  
Second: Tom Curyto  
Vote: Unanimous

## Special Reports:

4,096 Students enrolled in PALCS as of Wednesday, September 15, 2021 for the 2021-2022 school year. Down from 4,670 (May 14, 2021).

## Review:

### Finances:

- a. First year of operation – \$4.5 million (included \$234,000 implementation grant from the A Department of Education)
- b. Second year of operation – \$10.5 million (included \$100,000 implementation grant from the PA Department of Education)
- c. Third year of operation – \$17 million
- d. Fourth year of operation \$19 million
- e. Fifth year of operation – \$21.4 million
- f. Sixth year of operation – \$23.5 million
- g. Seventh year of operation – \$25.2 million
- h. Eighth year of operation – \$26.1 million
- i. Ninth year of operation – \$29.1 million
- j. Tenth year of operation – \$29.7 million
- k. Eleventh year of operation – \$30.9 million
- l. Twelfth year of operation – \$30.9 million
- m. Thirteenth year of operation – \$35.2 million
- n. Fourteenth year of operation – \$42.3 million
- o. Fifteenth year of operation – \$47.2 million
- p. Sixteenth year of operation – \$54.1 million
- q. Seventeenth year of operation – \$78.2 million

### School District Payments:

a.	Billed through August for the 2021-2022 schoolyear	\$10,105,669.68
b.	Received from districts through 08/31/21	(\$5,486,050.54)
	Refunded to Districts through 08/31/21	\$0
	Received from UNIPAY through 08/31/21	(1,133,679.60)
	<b>TOTAL of B</b>	<b>(\$6,619,730.14)</b>
d.	Due for the 2020-2021 school year	\$3,485,939.54
e.	Due for the 2019-2020 school year	(\$33,198.64)
f.	Due for 2018-2019 Reconciliation	(\$3,677.42)
g.	Due for the 2017-2018 Reconciliation	(\$7,167.12)
h.	Due for the 2016-2017 Reconciliation	(\$45,045.82)
i.	Due for the 2015-2016 Reconciliation	(\$3,785.43)
j.	Due for the 2014-2015 Reconciliation	\$0
k.	Due for the 2013-2014 Reconciliation	\$28,995.12

## **Department Reports:**

- Mark Allen – Academics/Performing and Fine Arts/University Scholars
- Eileen Bowers – Director of Office Operations
- Seth Heiland – HR
- Mark Murray – IT
- Carlos Castillo – Student Services

## **Public Comments:**

## **Adjournment:**

21. **Motion:** Be it resolved that the meeting of the PA Leadership Charter School Board of Directors shall adjourn.

First: Gary Dougherty

Second: Tom Curyto

Vote: Unanimous

**Next meeting: November 12, 2021**

**Ending Time: 2:55 PM**

**will be located at  
1332 Enterprise Drive  
12:00 PM Executive Session  
1:00 PM Public Board Meeting  
(approximate)**

CERTIFICATION VERIFICATION FORM

Staff No.	Name of employee (List all names in alphabetical order)	PA Certified Yes/No	Areas of Certification Type of Certificate	Grades Teaching or Serving	All Areas of Assignment Subject Areas Teaching or Services Provided	Number of Hours Worked in Assignmnt	Percentage of Time in Certified Position	Percentage of Time in Areas Not Certified
1	Abreu, Laura	Yes	Spanish PK-12 Elementary K-6 - Instructional II	HS	Spanish	FT	100	0
2	Addlesberger, Amanda	Yes	Mid-Level English 6-9 Elementary K-6 - Instructional II	MS	Middle School Data and Intervention Specialist	FT	100	0
3	Akintoye, Katie	Yes	Elementay K-6 Mid-Level Math 6-9 Mid-Level Science 6-9 - Instructional II	MS	Science Grade 6	FT	100	0
4	Algeo, Bridget		Mid-Level Mathematics 6-9 - Health & Physical Educ PK-12 - Technology Education PK-12 - Instructional I	MS	Voyages Through Math A Grade 7	FT	100	0
5	Allen, Mark	No	No Certificate - Qualified as per charter regulations	K-12	Chief Academic Director	FT	0	100
6	Allen, Samantha	Yes	Elementary & Secondary School Counselor PK-12 - Instructional I	ES	School Counselor Grade 5	FT	100	0
7	Anderson, Heather	Yes	Bus-Computer-Info Tech PK-12 and Technology Education PK-12 - Instructional II; Inst Technology Specialist PK-12 - Educational Specialist II	HS	AP Computer Science - Computer Aided Design - Energy Power Transportation Technology - Introduction to Computer Aided Design - Manufacturing Construction and Robotics Technology - Student STEAM Society	FT	100	0
8	Andress, Edith	Yes	Biology 7-12 Chemistry 7-12 General Science 7-12 - Instructional II	HS	Chemistry	FT	100	0
9	Antar, Yassara	Yes	Physics 7-12 Mathematics 7-12 - Instructional II	HS	Physics - Probability - Statistics - STEM Committee	FT	100	0
10	Antonucci, Patrick	Yes	Mathematics 7-12 - Instructional II	HS	Algebra 1 - Calculus - Statistics - PreCalculus & Trigonometry	FT	100	0
11	Ashe, Patricia	Yes	Mathematics 7-12 - Instructional II	HS	Consumer Math - Geometry	FT	100	0
12	Atmajian, Cara	Yes	English 7-12 - Instructional II	Leadership	Supervisor of Curriculum	FT	100	0
13	Ault, Megan	Yes	Elementary K-6 - Instructional II	ES	Grade 3	FT	100	0
14	Barch, Amy	Yes	Elementary K-6 Reading Specialist - Instructional II	ES	Grade 1	FT	100	0
15	Barlat, Benedicte	Yes	Spanish PK-12 French PK-12 - Instructional II	HS	French	FT	100	0
16	Barns, Keisha	Yes	General Science 7-12 Biology 7-12 - Instructional I	HS	Biology - Resigned 8/6/21	FT	100	0
17	Baskwill, Jeffrey	Yes	Mathematics 7-12 - Instructional II	USP	Statistics - Geometry - Sports and Wellness Enrichment	FT	100	0
18	Bassetti, Dea	Yes	Bus-Compter-Info Tech K-12 Mid-Level Mathematics 7-9 - Instructional II	MS	Math Interventionist - Resinged 9/29/2021	FT	100	0
19	Bathe, Jennifer	Yes	Ment and/or Phys Hanicapped K-12 - Instructional II	SpEd MS	Resource Teacher	FT	100	0
20	Becker, Lara	Yes	Special Education N-12 - Instructional II	SpEd ES	Resource Teacher	FT	100	0
21	Bennett, Lisa	Yes	Music K-12 - Instructional II	CPFA	Vocal Music	FT	100	0
22	Bergmaier, Michelle	Yes	Grades PK-4 - Instructional I	ES	Kindergarten	FT	100	0
23	Berman, Adam	Yes	Biology 7-12 Chemistry 7-12 Physics 7-12 Earth and Space Science 7-12 Technology Education PK-12 - Instructional II	HS	Physics - Intro to Engineering - Tech/Coding - Computer Science - Keystone Review Biology - Earth Space Science	FT	100	0
24	Black, Mary	Yes	Special Education N-12 Early Childhood N-3 - Instructional II	SpEd ES	Resource Teacher	FT	100	0
25	Boccasini, Sarah	Yes	Early Childhood N-3 Elementary K-6 Special Education PK-12 Mid-Level English 6-9 Reading Specialist PK-12 - Instructional II	MS	Reading Specialist	FT	100	0
26	Bonfadini, Joseph	Yes	Social Studies 7-12 - Instructional I	HS	U.S. Government - World History	FT	100	0
27	Borusky, Ryan	Yes	Social Studies 7-12 - Instructional II	MS	Social Studies	FT	100	0
28	Boyce, Alexis	Yes	Elementary K-6 Special Education PK-12 Mid Level Mathematics 6-9 Reading Specialist PK-12 - Instructional II	SpEd LS	Resource Teacher	FT	100	0
29	Bradley, Michele	Yes	Health & Physical Educ PK-12 - Instructional II; Special Education 7-12- Instructional II	MS	Health Safety Physical Education	FT	100	0
30	Brauch, April	Yes	Elementary and Secondary School Counselor PK--12 Secondary - Educational Specialist I School Counselor 7-12 - Educational Specialist II	HS GUID	School Counselor	FT	100	0
31	Brice, Melissa	Yes	English 7-12 Mid-Level Citiz. Ed 6-9 - Instructional II	HS	English - Writers Workshop	FT	100	0

Staff No.	Name of employee (List all names in alphabetical order)	PA Certified Yes/No	Areas of Certification Type of Certificate	Grades Teaching or Serving	All Areas of Assignment Subject Areas Teaching or Services Provided	Number of Hours Worked in Assignmmt	Percentage of Time in Certified Position	Percentage of Time in Areas Not Certified
32	Bridgewater, Paula	Yes	Mathematics 7-12- Instructional I	HS	Algebra	FT	100	0
33	Brooks, Nicole	Yes	Grades PK-4 - Instructional I	ES	Grade 2	FT	100	0
34	Brown, Amy	Yes	Mid Level Mathematics 6-9 Mid Level English 6-9 Elementary K-6 - Instructional I	MS	Mathematics Grade 7	FT	100	0
35	Brown, Melissa	No	Day Sub - Qualified as per Charter Regulations	USP	Day Substitute	PT	0	100
36	Brown, Taylor	No	Day Sub - Qualified as per Charter Regulations	CPFA	Day Substitute	PT	0	100
37	Burns, Caitlin	Yes	Grades 4-8 (All subjects 4-6 Mathematics 7-8) - Instructional II	MS	Math Grade 6 - Voyages Through Math 7 - Culinary Group	FT	100	0
38	Butler, Edward	Yes	Elementary K-6 - Instructional I	ES	Grade 5	FT	100	0
39	Calvitto, Patricia	Yes	Elementary and Secondary School Counselor PK-12 - Instructional I	ES GUID	School Counselor Grades K-3	FT	100	0
40	Campi, Bridget	Yes	Elementary K-6 Reading Specialist PK-12- Instructional II	ES	Kindergarten	FT	100	0
41	Caratello, Danielle	Yes	Special Education PK-8- Instructional I; Grades PK-4 Instructional I	SpEd ES	Resource Teacher	FT	100	0
42	Carey, Lisa	No	Communications/Media Stud Dance - College Major - Qualified as per charter regulations	CPFA	Dance	FT	100	0
43	Case (Verner), Lauren	Yes	Mid-Level Math 6-9 Elementary K-6 Mid-Level Science 6-9 - Instructional II	MS	Voyages Through Math A Grade 8	FT	100	0
44	Castillo, Carlos	Yes	Spanish PK-12 - Instructional II; Principal PK-12 - Administrative I	Student Services	Director of Student Services	FT	0	100
45	Castle, Jamie	Yes	Biology 7-12 Chemistry 7-12 - Instructional II	USP	Biology - Chemistry - Human Anatomy & Physiology - Instructional Coaching	FT	100	0
46	Cerynik, Linda	Yes	Elementary K-6 Grades 4-8 (All subjects 4-6, English Language Arts and Reading 7-8) English 7-12- Instructional I	USP	English	FT	100	0
47	Clevenger (Love), Tammara	Yes	Social Studies 7-12 Special Education 7-12 - Instructional I	HS	Resource Teacher - Resigned 8/6/2021 - Rehired 10/18/2021	FT	100	0
48	Clothier, Cheryl	Yes	Elementary K-6 - Instructional II Health & Physical Educ; Principal K-12 - Administrative II	ES	Elementary Principal	FT	100	0
49	Cognetti, Lee	Yes	English 7-12 - Instructional II	USP	English	FT	100	0
50	Cole, Tiffany	Yes	Early Childhood N-3 Elementary K-6 Mid-Level Mathematics 6-9 Reading Specialist PK-12 - Instructional II English as a Second Language (ESL) PK-12- Program Specialist II	MS	Math Grade 6 - Rosetta	FT	100	0
51	Conrad, Genevieve	Yes	Special Education PK-8 Grades PK-4 Grades 5-6 - Instructional I	ES	Grade 4	FT	100	0
52	Constable, Kathryn	Yes	Reading Specialist PK-12 Ment and/or Phys Handicapped K-12 - Instructional II	K-12	High School Data and Intervention Specialist	FT	100	0
53	Cooper, Steven	Yes	Elementary K-6 - Instructional II	ES	Grade 5	FT	100	0
54	Cose, Brynn	Yes	Special Education PK-8- Instructional I; Grades PK-4 Instructional I	SpEd LS	Resource Teacher	FT	100	0
55	Costanzi, Maria	Yes	Mathematics 7-12 - Grades 4-8 (All subjects 4-6, Mathematics 7-8) - Instructional I	MS	Voyages Through Math A Grade 6 - Math 7	FT	100	0
56	Costello, Michele	Yes	IEP COORDINATOR Special Education N-12 English 7-12 Mid-Level Science 6-9 Social Studies 7-12 Biology 7-12 - Superv Special Education PK-12 - Instructional II	SpEd - Leadership	Assistant Supervisor of Special Education	FT	0	100
57	Council, Jonathan	No	Video Productions degree -not yet qualified under charter regs	CPFA	Video Production Teacher	FT	0	100
58	Craig, Pamela	Yes	Elementary K-6 - Science, Technology, Engineering & Math (STEM) Ed PK-12 - Instructional II	ES	Grade 5	FT	100	0
59	Crisafio, Julie	Yes	French PK-12 - Instructional II	MS	French	FT	100	0
60	Crowley, Sarah		English 7-12 - Instructional I	HS	Literature & Composition - Mythology - English Grade 9		100	0
61	Cruz, Ashley	Yes	English 7-12 - Instructional I	HS	English - Journalism - Keystone Review Literature	FT	100	0
62	Culleiton, Brynn	Yes	Elementary K-6 - Instructional I	ES	Kindergarten	FT	100	0
63	Currie, Zachary	Yes	English 7-12 - Instructional I	HS	English - Film As Literature - Anime	FT	100	0
64	Dale, Jacqueline	Yes	Elementary K-6 - Instructional II	ES	Grade 4	FT	100	0
65	Daley, Lori	Yes	Elementary K-6 - Ment and/or Phsy Handicapped K-12 Grades 4-8 (All subject 4-6, Social Studies 7-8) Grades 4-8 (All subject 4-6, English Language Arts and Reading 7-8) Grades 4-8 (All subject 4-6, Science 7-8) - Instructional I	MS	English Grades 6-7	FT	100	0
66	Daniel, Holly	Yes	English as a Second Language (ESL) PK-12 - Program Specialist Japanese PK-12 - Instructional II	K-12 ESL	English as a Second Language	FT	100	0



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67	Dawson, Cassidy	Yes	Elementary & Secondary School Counselor PK-12- Educational Specialist II	HS	School Counselor - Resigned 11/5/2021	FT	100	0
68	Day, Kristina	Yes	Early Childhood N-3 Elementary K-6 - Instructional II	ES	Reading Specialist Grades 3-5	FT	100	0
69	DeCosmo (Baiada), Kimberly	Yes	Elementary K-6 - Instructional I	ES	Grade 3	FT	100	0
70	DeJoseph, Erin	Yes	Social Studies 7-12 Citizenship 7-12 - Instructional II English as a Second Language ESL PK-12 - Program Specialist	HS	Economics - Street Law - Microeconomics - Student Government - Human Geography	FT	100	0
71	DeLuca, Tina	Yes	Social Studies 7-12 Special Education 7-12 - Instructional II	SpEd HS	Resource Teacher - Resigned 5/12/2022	FT	100	0
72	Demi, Debra	Yes	Mathematics 7-12 - Instructional I	USP	Algebra	FT	100	0
73	DeMoerlose, Adriene	Yes	Elementary K-6 Mid-Level English K-9 - Instructional I	MS	English Grades 7-9 - Resigned 4/8/2022	FT	100	0
74	Devinney, Mollie	Yes	Biology 7-12- Instructional II	MS	Science Grade 8	FT	100	0
75	DeZelaya, Andrea	Yes	Spanish PK-12 - Program Specialist ESL PK-12 - Instructional II	HS	Spanish	FT	100	0
76	Dibert, Jennifer	Yes	Mentally and/or Physically Handicapped K-12 - Instructional II English as a Second Language (ESL) PK-12- Program Specialist I	SpEd MS	Resource Teacher-Resigned 8/3/2021	FT	100	0
77	DiCamillo, John	Yes	Elementary K-6 - Instructional II	MS	Social Studies Grade 6	FT	100	0
78	DiCicco, Bob	Yes	Mathematics 7-12 Mid-Lev Mathematics 6-9 Mid-Lev English 6-9 Elementary K-6 - Instructional II	HS	Algebra - Consumer Math	FT	100	0
79	DiFerdinando, Lauren	Yes	Elementary School Counselor K-6 Secondary School Counselor 7-12 - Educational Specialist II	MS GUID	Middle School Counselor Grades 6-8	FT	100	0
80	Dinh, Mai	Yes	Grades PK-4 - Instructional I	ES	Grade 4	FT	100	0
81	DiPaolo, Jill	Yes	Elementary K-6 Special Education PK-12 - Instructional II Elementary School Counselor K-6 Secondary School Counselor 7-12 - Educational Specialist II	HS GUID	High School Counselor Grade 9	FT	100	0
82	DiPaolo, Paula	Yes	Elementary K-6 Early Childhood N-3 Reading Specialist PK-12 Intructional Coach PK-12 - Instructional II	MS	Reading Specialist	FT	100	0
83	Disciullo, Anne	Yes	Mathematics 7-12 - Instructional II	HS	Algebra - Mathematical Thinking	FT	100	0
84	Donegan, Jessica	Yes	Elementary K-6 Mid-Level English 6-9 Mid-Level Mathematics 6-9 Reading Specialist K-12 - Instructional II	ES	Grade 4	FT	100	0
85	Doogan, Daniel	Yes	Social Studies- Instructional II	HS	US History - US Government	FT	100	0
86	Dougherty, Julie	Yes	Early Childhood N-3 Elementary K-6 - Instructional II	ES	Math Interventionist Grades 3-5	FT	100	0
87	Dougherty, Reilly	Yes	Grades PK-4 - Instructional I	ES	Grade 1	FT	100	0
88	Doyle, Thomas	Yes	Citizenship 7-12 - Spcial Education 7-12 - Instructional I	SpEd HS	Resource Teacher	FT	100	0
89	Dukes, Caitlin	Yes	Grades PK-4 Special Education PK-8 - Instructional I	SpEd ES	Resource Teacher	FT	100	0
90	Duncan, Toni	No	Dance; Marketing - Qualified as per charter regulations	CPFA	Dance	FT	0	100
91	Efthimiadou, Michelle	Yes	Elementary K-6, English 7-12, Mentally and/or Physically Handicapped K-12 Mid-Level Mathematics 7-9,Reading Specialist PK-12 - Instructional II	SpEd HS	Resource Teacher	FT	100	0
92	Esposito, Salvatore	Yes	Health & Physical Education PK-12 - Instructional I	ES	Health, Safety, and Physical Education	FT	100	0
93	Fabrizio, Cristen	Yes	Elementary K-6 - Instructional II	ES	Grade 4	FT	100	0
94	Fausnacht, Todd	Yes	Grades 4-8 (All subjects 4-6, Mathematics 7-8) Grades 4-8 (All subjects 4-6, English Language Arts and Reading 7-8) - Instructional I Elementary & Secondary School Counselor PK-12 - Education Specialist I	MS	English Grades 7-9 - Resigned 3/11/2022	FT	100	0
95	Ferris, Elizabeth	Yes	Elementary K-6 - Instructional II	ES	Grade 4	FT	100	0
96	Fiorenza, Darian	No	Day Sub - Qualified as per Charter Regulations	CPFA	Day Substitute	PT	0	100
97	Flagler, John	Yes	English 7-12 - Instructional II	HS	English/Communication - Resigned 11/5/21	FT	100	0
98	Flynn, Emily	Yes	Special Education PK-8 Grades PK-4 - Instructional I	ES	Grade 1	FT	100	0
99	Focht, Loren	Yes	Special Education N-12 Elementary K-6 - Instructional II	SpEd MS	Resource Teacher	FT	100	0
100	Fontanes, Lisa	Yes	Elementary K-6 Instructional I	ES	Grade 5	FT	100	0
101	Fossesca, Danica	Yes	Grades PK-4 Special Education PK-8 - Instructional I	ES	Grade 4 - Resigned 4/18/2022	FT	100	0
102	Foster, Devin	Yes	Earth and Space Science, General Science 7-12 Instructional I	HS	Earth Space Sci - Astronomy	FT	100	0
103	Francisco, Amanda	Yes	Special Education N-12 Elementary K-6 - Instructional II	SpEd HS	Resource Teacher	FT	100	0
104	Freiko, Janee	Yes	Music PK-12 - Instructional I	ES	Music	FT	100	0
105	Fuiman, Joseph	Yes	Art K-12 - Instructional II	CPFA	Art	FT	100	0

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106	Garrow, Darlene	Yes	Principal K-12 - Administravite I; Special Education N-12, Early Childhood N-3 - Instructional II	ES	Elementary Assistant Principal	FT	100	0
107	Gerstle, David	Yes	Social Studies 7-12 - Instructional I	MS	Summer 8th American Nation - World Studies Grade 7	FT	100	0
108	Giampietro, Megan	Yes	Mid-Level Science 6-9, Art PK-12, Mid-Level Citiz. Ed 6-9, Social Studies 7-12, Technology Education PK-12, Biology 7-12, General Science 7-12 - Instructional II - Principal K-12 - Administrative	HS	Eath and Space Science - Nature Study - Zoology	FT	100	0
109	Gore, Sophia	No	TheatArt - Qualified as per charter regulations	CPFA	Theatre	FT	0	100
110	Grablewski, Jennifer	Yes	School Nurse PK-12 Emergency Certification	K-12	School Nurse	FT	100	0
111	Greene, Lisa	Yes	Enlgish 7-12- Instructional I	MS	Language Arts Grade 6	FT	100	0
112	Greenfield, Jason	No	Drama/TheatArt/Stage - College Major - Qualified as per charter regulations	CPFA	Theatre	FT	0	100
113	Greiser, Wayne	Yes	Bus-Computer-InfoTech PK-12 Elementary K-6 - Instructional I	HS	Business Mgmt - Game Design Development - Learning Google Apps - Money Mgmt - Social Media	FT	100	0
114	Griffel, Erica	Yes	Elementary K-6 Reading Specialist K-12 - Instructional II	ES	Grade 4	FT	100	0
115	Gross, Barbara	Yes	Bus-Computer-Info Tech PK-12; Family-Consumer Sci PK-12 - Instructional II	MS	Adaptive Business - Business Comm & Critical Thinking - Fund of Comp Sci -Travel and Tourism	FT	100	0
116	Guerriero, Melissa	Yes	Art PK-12 - Instructional II	HS	Adaptive Art - Arts and Culture - Found of Art and Design - Mobile Photography Club - Adaptive Art	FT	100	0
117	Gustafson, Jason	Yes	Health & Physical Educ PK-12 - Instructional II	ES	Health, Safety, and Physical Education	FT	100	
118	Hammond, Katelyn	Yes	Elementary K-6 - Instructional I	HS	Instructional Coach	FT	100	0
119	Harmantzis, Nicholas	Yes	Music PK-12 - Instructional I	CPFA	Fine Arts Music	FT	100	0
120	Harp, Amber	Yes	Social Studies 7-12 Ment and/or Phys Handicapped K-12 - Instructional II	SpEd HS	Resource Teacher	FT	100	0
121	Harrigan, Shannon	Yes	Social Studies 7-12 English 7-12 - Instructional II	HS	World History - AP Psychology	FT	100	0
122	Harris, Kristin	Yes	Early Childhood N-3 - Instructional II	ES	Grade 2	FT	100	0
123	Hartzell, Tammy	Yes	School Nurse - Educational Specialist II	K-12	School Nurse	FT	100	0
124	Hayden, Christopher	Yes	Health & Physical Education - Instructional I	HS	Health, Safety, and Physical Education	FT	100	0
125	Henley, Kevin	Yes	English 7-12 Social Studies 7-12 - Instructional II	HS	Economics - English 10 & 11 - SAT/ACT Preparatory Course - Language & Composition	FT	100	0
126	Hitesman, Elizabeth	Yes	Special Education PK-12 English 7-12 - Instructional II	SpEd MS	Resource Teacher	FT	100	0
127	Hocker, Hannah	Yes	Elementary K-6 - Instructional I English as a Second Language ESL PK-12 - Program Specialist	ES	Grade 1	FT	100	0
128	Holden, Brian	Yes	Social Studies 7-12 - Instructional II	HS	Sociology - World History	FT	100	0
129	Homka, Jennifer	Yes	Early Childhood N-3 - Special Education PK-12 - Elementary K-6 - Instructional I	SpEd - MS	Resource Techer	FT	100	0
130	Hopson, Martin	Yes	English 7-12 - Instructional II	HS	English Language Composition - Film as Literature	FT	100	0
131	Humbert, Heather	Yes	Art PK-12 - Instructional II	MS	Elementary Art	FT	100	0
132	Hung, Meredith	No	LTS - Qualified as per Charter Regulations	USP	Biology LTS	FT	0	100
133	Ighemat, Nanila	Yes	Grades PK-4 French PK-12 - Instructional I Principal PK-12 - Administrative I	MS	French - Resigned 10/29/2021	FT	100	0
134	Inners, Timothy	Yes	Social Studies 7-12 - General Science 7-12 - Mid-Level Science 6-9 - Elementary K-6 Biology 7-12 - Chemistry 7-12 - Instructional II	HS	Biology - Physical Science	FT	100	0
135	Intelicato, Emily	Yes	General Science 7-12 - Instructional II	HS	Marine Science - Forensic Science - Physical Science	FT	100	0
136	Jackson, Tessa	Yes	Earth and Space Science, General Science 7-12 Instructional I	MS	Science Grade 7	FT	100	0
137	Johnson, Karla	Yes	Principal PK-12 - Administrative II; Physics 7-12 -Instructional II	MS	Middle School Principal	FT	100	0
138	Johnson (Bernardini), Kathleen	Yes	Citizenship 7-12 - Instructional II	USP	Contemporary Worl History - U.S. History	FT	100	0
139	Juliano, David	Yes	Social Studies 7-12 - Instructional II; Principal PK-12 - Administrative I	HS	High School Assistant Principal	FT	100	0

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140	Kaelin, Rebecca	Yes	Bus-Computer-Info Tech PK-12 - Instructional I	HS	Business - Marketing - Microsoft Office Applications	FT	100	0
141	Kang, Dawn	Yes	Mathematics 7-12 - Instructional II	MS	Math Grade 8	FT	100	0
142	Kaplan, Julie	Yes	Social Studies 7-12 - Instructional II	HS	World History - U.S. History - Psychology - Human Geography -	FT	100	0
143	Karus (Peterson), Erin	Yes	Elementary K-6 Ment and/or Phys Handicapped K-12	MS	Resource Teacher	FT	100	0
144	Kelly, Katharine	Yes	Soical Studies 7-12 - Instructional I	MS	Social Studies Grade 6 - World Studies Grade 7	FT	100	0
145	King, Brittany	Yes	Biology 7-12 - Instructional II	HS	Biology - Resigned 8/17/21	FT	100	0
146	Kinneary, Linda	Yes	School Nurse PK-12 - Educational Specialist II	K-12	Health Services Supervisor	FT	100	0
147	Kirk (Bergmaier), Jessica	Yes	Elementary School Counselor K-6 Secondary School Counselor 7-12 - Educational Specialist II	ES GUID	School Counselor K-3	FT	100	0
148	Knox, Diana	Yes	Early Childhood N-3 Elementary K-6 Reading Specialist PK-12 - Instructional II	ES	Kindergarten	FT	100	0
149	Kofeldt, Courtney	Yes	English 7-12 - Instructional II - Educational Technology	Leadership	Supervisor of Educational Technology	FT	100	0
150	Kotch, Nicole	Yes	Health & Physical Education - Instructional II	HS	Health Safety and Physical Education	FT	100	0
151	Kulp-Woodruff, Deborah	Yes	Ment and/or Phys Handicapped K-12 - Instructional II	SpEd - Leadershi	Supervisor of Special Education	FT	100	0
152	Laing, Rachel	Yes	Grades PK-4 Special Education PK-8 - Instructional I	ES	Kindergarten	FT	100	0
153	Laurelli, Ellen	Yes	Elementary K-6 Mid-Level English 6-9 Special Education PK-12 Reading Specialist PK-12 - Instructional II	SpEd HS	Resource Teacher	FT	100	0
154	Laureys, Kristin	Yes	Biology 7-12 Chemistry 7-12 - Instructional I	HS	Biology - Anatomy & Physiology	FT	100	0
155	Leidner, Anna	Yes	Grades PK-4 - Instructional I	ES	Grade 3	FT	100	0
156	Leone, Jennifer	Yes	Elementary K-6 Mid-Level Science 6-9 - Instructional II	MS	Science Grade 6	FT	100	0
157	Lewis, Hannah	Yes	English as a Second Language PK-12 English 7-12 Social Studies 7-12 - Instructional II	MS	Language Arts Grade 8	FT	100	0
158	Lineman, Justin	Yes	Grades PK-4 - Instructional I	ES	Kindergarten	FT	100	0
159	Loftus, Tabitha	Yes	Grades PK-4 - Instructional I	ES	Grade 3 - Resgined 12/3/2021	FT	100	0
160	Logue, Michael	Yes	Principal PK-12 - Administrative Provisional I; Social Studies 7-12 - Instructional II	HS	High School Principal	FT	100	0
161	Loladze, Aimee	Yes	Biology 7-12 - Instructional I	USP	Earth & Space - Physical Science - Robotics MS Enrichment	FT	100	0
162	Longstreth, Carrie	No	Career and Technical Education Coordinator	HS	Career and Technical Education Coordinator	FT	0	100
163	Lynch-McCulloch	No	Day Sub - Qualified as per Charter Regulations	CPFA	Day Substitute	PT	0	100
164	Mackey, Kirsten	Yes	Mathematics 7-12 Grades 4-8 All Subjects 4-6 Mathematics 7-8 - Instructional II	USP	Algebra I - AP Computer Science - Math Counts - Pre-Calculus & Trig - Resinged 3/7/2022	FT	100	0
165	Madison, Eric	Yes	Mathematics - Instructional II	HS	Algebra - Geometry - SAT/ACT Preparatroy	FT	100	0
166	Mahoney, Kelsey	Yes	Elementary K-6 Mid-Level English 6-9 Mid Level Mathematics 6-9 Mid-Level Science 6-9 - Instructional II	MS	Math Grade 8	FT	100	0
167	Majersky, Maria	Yes	Mathematics 7-12 - Instructional I	HS	Algebra - Pre-Calculus	FT	100	0
168	Makin, Holly	Yes	Special Education N-12 Elementary K-6 - Instructional II	SpEd Life Skills	Resource Teacher	FT	100	0
169	Malkasian (Jaskson), Alison	Yes	Special Education PK-12 Elementary K-6 - Instructional II	SpEd Life Skills	Resource Teacher	FT	100	0
170	Malvestuto, Andrea	Yes	Elementary School Counselor K-6, Secondary School Counselor 7-12 - Educational Specialist II	ES GUID	School Counselor 6-8	FT	100	0
171	Maniscalco, Stephen	Yes	Health& Physical Educ PK-12 - Instructional II	ES	Health Safety & Physical Education Elementary	FT	100	0
172	Marks, Christine	Yes	General Science 7-12 - Instructional I; Secondary School Counselor 7-12 - Educational Specialist II	MS GUID	School Counselor 6-8	FT	100	0
173	Markward, John	Yes	Physics 7-12 Chemistry 7-12 - Instructional II	USP	AP Physics - STEM	FT	100	0
174	Martin, Amanda	Yes	Special Education N-12 - Instructional I	SpEd HS	Resource Teacher - Resigned 8/6/21	FT	100	0
175	Martin, Megan	Yes	English 7-12 Social Studies 7-12 Citizenship 7-12 - Instructional II	MS	Language Arts Grade 7	FT	100	0
176	Martini, Marissa	Yes	Social Studies 7-12 English 7-12 - Instructional I	MS	American Nation	FT	100	0
177	Mattaboni, Veronica	Yes	English LTS - Qualified as per charter regulations-Emergency Certification Type 1	USP	Seminar Language Arts II	PT	100	0
178	Mazzio, Lauren	Yes	Elemtary & Secondary School Counselor PK-12 - Education Specialist I	CPFA GUID	CPFA Gudiance Counsleor	FT	100	0

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179	McAleer, Julianna	Yes	Special Education PK-8- Instructional I; Grades PK-4 Instructional II; Autism PK-12- Endorsement	SpEd MS	Resource Teacher	FT	100	0
180	McCain, Megan	Yes	Elementary & Secondary School Counselor PK-12 - Instructional I Principal PK-12 - Administrative I	ES GUID	Guidance 4	FT	100	0
181	McCartney, Ryan	Yes	Social Studies 7-12 Special Education 7-12 - Instructional I	SpEd HS	Resource Teacher	FT	100	0
182	McCunney, Michelle	Yes	Art PK-12 - Instructional II	MS	Adaptive Art - Art Appreciation - Art in the Digital Age - History of Art	FT	100	0
183	McGeehin, Shelby	Yes	English 7-12 Special Education PK-12 - Instructional II	SpEd HS	Resource Teacher	FT	100	0
184	McGinty, Shavaun	Yes	Elementary School Counselor K-6 - Educational Specialist II	GUID - Leadership	Supervisor of Guidance Department	FT	100	0
185	McGoldrick, Victoria	Yes	Elementary K-6 - Instructional II	ES	Grade 3	FT	100	0
186	McGowan, Rachel	Yes	Elementary and Secondary School Counselor PK-12 English 7-12 Grades 4-8 (All Subjects 4-6 English Language Arts and Reading 7-8) - Instructional II	USP GUID	USP School Counselor - English & Liturature Composition	FT	100	0
187	McLaughlin, Laurel	Yes	Grades PK-4 - Instructional I	ES	Kindergarten - Resigned 8/6/21	FT	100	0
188	McMahon, Nicole	Yes	Special Education PK-8 Grades PK-4 - Instructional I	SpEd ES	Resource Teacher	FT	100	0
189	McNeila, Amber	Yes	English 7-12 - Instructional I	MS	Language Arts Grade 8	FT	100	0
190	Michael, Bryan	Yes	Special Education PK-12 Elementary K-6 - Instructional II	SpEd HS	Resource Teacher	FT	100	0
191	Miller, Katherine	Yes	Mathematics 7-12 - Instructional II	MS	Mathematics Grade 7	FT	100	0
192	Mirpuri, Nikita	Yes	Special Educational PK-8; Grades PK-4 - Instructional I	MS	Contracted Resource Teacher	PT	100	0
193	Molina, Brianna	Yes	General Science 7-12 - Instructional I	MS	Science Grades 6-7	FT	100	0
194	Moose, Jessica	Yes	Elementary & Secondary School Counselor PK-12 - Instructional I	HS GUID	School Counselor Grade 12	FT	100	0
195	Moran, Kelly	Yes	Elementary K-6 - Instructional I	ES	Grade 2	FT	100	0
196	Morris, Samuel	Yes	Citizenship 7-12 - Instructional I	USP	Liberty & Democracy - Psychology	FT	100	0
197	Morrow (Pettina), Victoria	Yes	English 7-12 Special Education 7-12 -Instructional II	SpEd HS	IEP Compliance Monitor	FT	100	0
198	Mortin, Jessica	Yes	Grades PK-4 - Instructional I	ES	Grade 2	FT	100	0
199	Muller, Kelley	Yes	Elementary K-6 Mid-level English 6-9 Mid-level Mathematics 6-9 - Instructional II	MS	Math Interventionist	FT	100	0
200	Murphay, Ashley	Yes	English 7-12 Special Education 7-12 Reading Specialist PK-12 - Instructional II	SpEd	IEP Coordinator	FT	100	0
201	Murray, Sean	Yes	Elementary K-6 Special Education PK-8 Special Education Expansion 7-12 - Instructional I	SpEd HS	Resource Teacher	FT	100	0
202	Natale, Cheyanne	Yes	Elementary & Secondary Counselor PK-12 Educational Specialist I	ES GUID	School Counselor - Resigned 8/6/2021	FT	100	0
203	Newingham, Alexis	Yes	Biology 7-12 - Instructional I	HS	Biology	FT	100	0
204	Nguyen, Trinh	Yes	Art PK-12 - Instructional I	ES	Art Grades K-5 - Resigned 8/6/2021	FT	100	0
205	Okcuoglu, Daphne	Yes	Art PK-12 - Instructional II	CPFA	Photography - Studio Art - Techniques in Drawing and Painting	FT	100	0
206	Olson, Brenda	Yes	Elementary K-6 Mid-Level English 7-9 - Instructional II	ES	Grade 5	FT	100	0
207	Owens, Rose	Yes	Instructional I - Grades 4-8 (All subjects 4-6 English/Language Arts and Reading 7-8); Instructional I Special Education PK-8 (9226)	ES	Grade 5 - resigned 10/1/2021	FT	100	0
208	Packer, Cory	Yes	Elementary K-6 - Instructional II	ES	Grade 5	FT	100	0
209	Paffas, Basil	Yes	Social Studies 7-12 English 7-12 - Instructional II	HS	U.S. Government - Intro to Philosophy	FT	100	0
210	Palivoda, Sheri	Yes	Elementary K-6 Mid-level English 7-9 Library Science K-12 English 7-12 - Instructional II; English as a Second Language (ESL) K-12 - Program Specialist	MS	Language Arts Grades 6-8	FT	100	0
211	Palmer, William	Yes	Mathematics 7-12 Physics 7-12 Chemistry 7-12 - Instructional II	HS	Algebra - Consumer Math - Geometry	FT	100	0
212	Palushaj, Kristina	Yes	Grades 4-8 (All Subjects 4-6 Mathematics 7-8 Science 7-8) - Instructional II	MS	Math and Science Grades 7-8	FT	100	0
213	Pardus, Merissa	Yes	Special Education PK-12 Early Childhood N-3 - Instructional II	SpEd HS	Resource Teacher	FT	100	0
214	Park, Ewan	Yes	Social Studies - Instructional II; Principal K-12 - Administrative	USP	American Law & International Relations - European History - Compartative Government and Politics	FT	100	0
215	Patterson, Brianna	Yes	English 7-12 - Instructional I	HS	AP Language & Composition - Grade 11 English - Resigned 4/1/2022	FT	100	0

Staff No.	Name of employee (List all names in alphabetical order)	PA Certified Yes/No	Areas of Certification Type of Certificate	Grades Teaching or Serving	All Areas of Assignment Subject Areas Teaching or Services Provided	Number of Hours Worked in Assignmmt	Percentage of Time in Certified Position	Percentage of Time in Areas Not Certified
216	Patterson, Melissa	Yes	Grades 4-8 (All Subjects 4-6, Science 7-8)- Instructional I; Grades 4-8 (All subjects 4-6, Mathematics 7-8)- Instructional II	MS	Math Grade 6 - Art Math Fusion	FT	100	0
217	Paul, Leslie	Yes	English as a Second Language (ESL) PK-12 Art PK-12 - Instructional II	ES	Art Grades K-5	FT	100	0
218	Peccina, Nicolette	Yes	Grades PK-4 - Instructional I	ES	Grade 1	FT	100	0
219	Perez, Audrey	Yes	Chemistry 7-12- Instructional II; General Science- Instructional II	HS	Chemistry - General Science	FT	100	0
220	Perri, Emily	Yes	Elementary K-6 - Instructional II	ES	Grade 1	FT	100	0
221	Petro, Robert	Yes	Biology Chemistry General Science Earth and Space Science Social Studies7-12 - Instructional II	USP	Chemistry - Astronomy - Space Exploration Enrichment - STEM MS Enrichment	FT	100	0
222	Pettit, Todd	Yes	English 7-12 Mid-Lev Citiz Ed 6-9 - Instructional II	HS	English 10 - Creative writing - Shakespeare Studies	FT	100	0
223	Pettitt, Brooke	Yes	Citizenship 7-12 English 7-12 Special Education 7-12 - Instructional I	ES	Middle School Instructional Coach	FT	100	0
224	Pfaff, Megan	Yes	Elementary K-6 Reading Specialist PK-12 - Instructional II	ES	Grade 3	FT	100	0
225	Pica, Nicole	Yes	Biology 7-12 - Instructional I	HS	Biology - Environmental Education - Resigned 10/27/21	FT	100	0
226	Piccione, Joseph	Yes	Social Studies Mid-level Mathematics 7-9 General Science - Instructional II	HS	U.S. History - World History	FT	100	0
227	Portney, Bobbi	Yes	Mid-Level Mathematics - Elementary K-6	USP	Algebra - Foundations of Mathematical Thinking	FT	100	0
228	Priar, Heather	Yes	Elementary & Secondary School Counselor PK-12- Educational Specialist II	HS GUID	School Counselor Grade 10	FT	100	0
229	Propato, Gabriella	Yes	English 7-12 - Instructional I	HS	English Grade 11 - Creative Writing	FT	100	0
230	Propfe, Tyler	Yes	Music PK-12 - Instructional I	ES	Music Grades K-5	FT	100	0
231	Przeworski, Katherine	Yes	Biology 7-12 - Instructional II	USP	Biology - Environmental Science	FT	100	0
232	Puma, Caroline	Yes	Grades PK-4 - Instructional I	ES	Grade 1 - resigned 10/22/2021	FT	100	0
233	Putt, Jeffrey	Yes	Accounting 7-12 Marketing 7-12 Marketing-Dist Ed Tchr Coord 7-12 Data Processing 7-12 Bus-Computer-Info Tech Instructional II; Principal PK-12 - Administrative I	HS	Coding in HTML and CSS - Graphic Communications - Mobile Programming - Technology Concepts - Programming in C++	FT	100	0
234	Quigley, Chistopher	Yes	Grades PK-4 - Instructional I	ES	Grade 2	FT	100	0
235	Rattman, Kristy	Yes	Elementary K-6 - Instructional II Elementary and Secondary School Counselor PK-12 - Education Specialist I English as Second Language (ESL) PK-12 - Program Specialist	ES	Grade 2	FT	100	0
236	Rausch, Alex	Yes	MS Asst Principal English 7-12 Mid-level Citiz. Ed 6-9 - Instructional II Principal Certification PK-12	MS	Assitant Middle School Principal	FT	100	0
237	Reading, Danielle	Yes	Elementary K-6 - Instructional II	ES	Grade 3	FT	100	0
238	Redcay, Ashley	Yes	English 7-12 - Social Studies 7-12 - English as Second Language - Intrstuctional I	MS	Social Studies Grade 7	FT	100	0
239	Reigner, Kevin	Yes	Elementary K-6 Mid-Level English 6-9 Mid-Level Mathematics 6-9 Mid-Level Science 6-9 - Instructional II	MS	Science Grade 8 - MS STEM	FT	100	0
240	Reiher, Daniel	Yes	Grades PK-4 - Grades 5-6 - English 7-12 - Social Studies 7-12 - Grades 4-8 (All subjects 4-6, Mathematics 7-8) - Grades 4-8 (All subjects 4-6, Science 7-8)	HS	U.S. Government - Government and Politics	FT	100	0
241	Reilly, Christine	Yes	Special Education PK-12 Elementary K-6 - Instructional I	SpEd HS	Resource Teacher - Resigned 8/13/21	FT	100	0
242	Renfer, Kelley	Yes	Social Studies 7-12 Special Education 7-12 - Instructional II	SpEd	Assistant IEP Compliance Monitor	FT	100	0
243	Ricciardi, Kimberly	Yes	Art K-12 Family-Consumer Sci K-12 - Instructional II	CPFA	Food Science -Child Development -Art	FT	100	0
244	Roak-Tincani, Lisa	Yes	Special Education PK-8 Grades PK-4 - Instructional I	SpEd MS	Resource Teacher	FT	100	0
245	Roberts, Allyson	Yes	Music PK-12 - Instructional II	CPFA	Piano - AP Music Theory & Composition - Resigned 8/6/2021	FT	100	0
246	Robinson, AnneMarie	Yes	Art K-12 - Instructional II	CPFA	Art	FT	100	0
247	Robinson, Erica	Yes	Grades PK-4 - Instructional I	ES	Grade 5	FT	100	0
248	Roman, Michael	Yes	Music PK-12 - Instructional I	HS	AP Music Theory - Music - Resigned 2/7/2022	FT	100	0
249	Rosle, Kathryn	Yes	English 7-12 - Instructional II	HS	English 9 - Children's Literature - African-American Literature	FT	100	0
250	Roth, Merridith	Yes	Health & Physical Educ PK-12 - Instructional I	HS	Health Safety and Physical Education	FT	100	0
251	Rue, David	Yes	Mathematics 7-12	MS	Math Grades 7-9 - Resigned 2/18/2022	FT	100	0
252	Saldutti, Nico	Yes	Grades PK-4 - Instructional II	ES	Math Interventionist Grades 3-4	FT	100	0

Staff No.	Name of employee (List all names in alphabetical order)	PA Certified Yes/No	Areas of Certification Type of Certificate	Grades Teaching or Serving	All Areas of Assignment Subject Areas Teaching or Services Provided	Number of Hours Worked in Assignmmt	Percentage of Time in Certified Position	Percentage of Time in Areas Not Certified
253	Salvo, Lisa	Yes	Elementary K-6 - Instructional I	ES	Grade 3	FT	100	0
254	Sarno, Amy	Yes	English 7-12 - Instructional II	MS	Remedial Middle School Program Coordinator	FT	100	0
255	Scapellati, Jennifer	Yes	English 7-12 - Instructional II	MS	English Grade 7-9	FT	100	0
256	Schelling, Jennifer	Yes	Elementary K-6 Reading Specialist PK-12 - Instructional II	ES	Data and Intervention Specialist	FT	100	0
257	Schellinger, Erik	Yes	English 7-12 Social Studies 7-12 - Instructional II	HS	Psychology - World History	FT	100	0
258	Schick, Katie	No	No Certificate - Qualified as per charter regulations	HS GUID	College and Financial Aid Advisor	PT	0	100
259	Schultz, Sarah	Yes	Social Studies 7-12 Special Education 7-12 - Instructional II	SpEd HS	Resource Teacher	FT	100	0
260	Sensing, Connor	Yes	English 7-12 - Instructional I	HS	African-American Literature- Writer's Workshop - Literature & Composition - English 12	FT	100	0
261	Sessa, Lakryn	Yes	Grades PK-4 - Instructional	ES	Kindergarten	FT	100	0
262	Sforza, Taylor	Yes	Grades PK-4 - Instructional	ES	Grade 1	FT	100	0
263	Sikora, Stephanie	Yes	Family-Consumer Sci PK-12 Bus-computer-Info Tech PK-12 - Instructional II	MS	Technology Exploration - Coding in HTML	FT	100	0
264	Slusser, Daniel	Yes	Health & Physical Educ PK-12 - Instructional II	MS	Health Safety and Physical Education	FT	100	0
265	Smith, Danielle	Yes	Elementary K-6 Mid-Level English 6-9 Special Education PK-12 Reading Specialist PK-12 - Instructional II	ES	Reading Specialist Grades K-2	FT	100	0
266	Smith, Jeff	Yes	Mathematics 7-12 Mid-Level Mathematics 6-9 Elementary K-6 ReadingSpecialist PK-12 Special Education PK-12 Bus-Computer-Info Tech PK-12 - Instructional II	HS	Algebra	FT	100	0
267	Smith, Kimberly	Yes	Biology 7-12 - Instructional I	MS	Science Grade 8	FT	100	0
268	Snyder, Kelly	Yes	Early Childhood N-3 Elementary K-6 Reading Specialist PK-12 - Instructional II	ES	Grade 5	FT	100	0
269	Snyder, Resa	Yes	Grades PK-4 - Instructional I	ES	Grade 3	FT	100	0
270	Solnosky, Adam	Yes	Health & Physical Educa PK-12 - Instructional I	MS	Health Safety and Physical Education	FT	100	0
271	Sommar, Albert	Yes	Mathematics 7-12 Physics 7-12 Technology Education PK-12 - Instructional II	USP	Calculus - Pre-Calculus & Trig - Algebra	FT	100	0
272	Sparrow, Brittny	Yes	Elementary K-6 - Instructional I	ES	Grade 5 - Resigned 8/6/21	FT	100	0
273	Speer, Ericka	No	Dance Education - Qualified as per charter regulations	CPFA	Dance	FT	0	100
274	Staszak, Shannon	Yes	French K-12 - Elementary K-6 - Mid-Level Science 7-9 - Mid-Level English 7-9 - Instructional II	ES	Grade 4	FT	100	0
275	Stefanski, MaryBeth	Yes	Secondary School Counselor - Educational Specialist II	USP GUID	USP School Counselor	FT	100	0
276	Steines, Elisabeth	Yes	Art PK-12 - Instructional II	HS	World Artist - Drawing - Art & Culture - Foundations of Art and Design	FT	100	0
277	Stiles, Christopher	Yes	Principal K-12 - Administrative II; Social Studies 7-12 Spanish K-12 - Instructional II	USP	Principal of University Scholars Program	FT	100	0
278	Strellec, Christina	Yes	English 7-12 Social Studies 7-12- Instructional II	MS	Resource Teacher	FT	100	0
279	Sumner, Shannon	Yes	English 7-12 - Instructional I	MS	Language Arts Grade 6	FT	100	0
280	Surden, Jessica	Yes	Music PK-12 - Instructional I	ES	Music Grades K-5	FT	100	0
281	Surine, Douglas	Yes	Mathematics 7-12 Bus-Computer-InfoTech PK-12 - Instructional II	HS	Algebra - Geometry	FT	100	0
282	Suski, Amy	Yes	Elementary K-6 TechnologyEducation PK-12 - Instructional I	ES	Coding and Technology Grades K-5	FT	100	0
283	Takac, Kristina	Yes	Mathematics - Instructional II; Equivalency - Master's	HS	Algebra - Geometry - Consumer Math	FT	100	0
284	Todd, Melina	Yes	Ment and/or Phys Handicapped K-12 - Instructional II	SpEd HS	Resource Teacher	FT	100	0
285	Todorovac, Erin	Yes	English 7-12 - Instructional II	USP	English Literature & Composition - British Literature - Creative Writing	FT	100	0
286	Tonici, Melissa	Yes	Spanish PK-12 - Instructional II	HS	Spanish	FT	100	0
287	Tope, Laura	Yes	Biology 7-12 - Instructional II	MS	Science Grade 7	FT	100	0
288	Towles, Reba	Yes	Grades PK-4	ES	Grade 3 - Resigned 8/6/2021	FT	100	0
289	Townsend, John	No	Theatre Degree - Qualified as per Charter Regulations	CPFA	Guitar	FT	0	100
290	Tuerk, Ryan	No	Day Sub - Qualified as per Charter Regulations	CPFA	Day Substitute	PT	0	100
291	Ulrich, Jennifer	Yes	Spanish PK-12 - Instructional II	MS	Spanish	FT	100	0
292	Urbine, Colleen	Yes	Elementary K-6 Special Education PK-12 - Instructional II - Educational Specialist I	ES	Grade 2	FT	100	0
293	VanEtten, Michael	Yes	Elementary K-6 Mid-Level Mathematics 6-9 Mid-Level English 6-9 - Instructional II	ES	Math Interventionist Grades K-5	FT	100	0
294	VanHassent, Daniel	Yes	Social Studies 7-12- Instructional II	HS	Human Geography - Psychology - World History	FT	100	0

Staff No.	Name of employee (List all names in alphabetical order)	PA Certified Yes/No	Areas of Certification Type of Certificate	Grades Teaching or Serving	All Areas of Assignment Subject Areas Teaching or Services Provided	Number of Hours Worked in Assignmmt	Percentage of Time in Certified Position	Percentage of Time in Areas Not Certified
295	Velez, Dean	Yes	Art PK-12 - Instructional I	CPFA	Substitute - Resigned 11/18/2021	PT	100	0
296	Victorius, Emily	Yes	Elementary K-6 Reading Specialist PK-12 - Instructional II	ES	Grade 2	FT	100	0
297	Voyten, Shawn	Yes	Special Education PK-12 Social Studies 7-12 - Instructional II	MS	Language Arts & Social Studies Grades 7-8	FT	100	0
298	Walker, Rebecca	Yes	Elementary & Secondary School Counselor PK-12- Educational Specialist II	HS GUID	School Counselor Grade 11	FT	100	0
299	Walsh, Julianne	Yes	English 7-12 Social Studies 7-12- Instructional I	HS	English Grades 10-12 - Gender in Media and Literature	FT	100	0
300	Walton, Benjamin	Yes	English 7-12 - Instructional II; Principal PK-12 Administrative I	HS	English Grades 10 & 12 - Public Speaking	FT	100	0
301	Waltz, Kristen	Yes	Social Studies 7-12 - Instructional II	HS	World Cizilizations	FT	100	0
302	Wentzel, Ryan	Yes	Social Studies 7-12 - Instructional I	USP	U.S. Government & Politics	FT	100	0
303	Werner, Danielle	Yes	Elementary K-6 Special Education PK-12 - Instructional II	ES	Grade 5	FT	100	0
304	West, Thomas	Yes	Music PK-12 - Instructional II	CPFA	Music	FT	100	0
305	Whisler, Vicki	Yes	English 7-12 Library Science PK-12 - Instructional II	HS	English Grades 9-11	FT	100	0
306	Wilkins, Joshua	Yes	Mathematics 7-12 - Instructional I	HS	Algebra	FT	100	0
307	Wilkocz, Christopher	Yes	Elementary K-6 - Instructional II	MS	Social Studies Grade 6	FT	100	0
308	Williams, Lauren	Yes	Elementary K-6 Special Education PK-12 Reading Specialist P-12 - Instructional II English as a Second Language (ESL) PK-12- Program Specialist I	SpEd ES	Resource Teacher	FT	100	0
309	Wilson (Lier), Irene	Yes	English as a Second Language PK-12 Elementary K-6 Mid-Level Math - Intstructional II	ES	Grade 1	FT	100	0
310	Wilson, Sherrie	Yes	Speech Correction K-12 - Instructional II	K-12	Speech Therapist	FT	100	0
311	Worrell, Raymond	Yes	Biology 7-12 Chemistry 7-12 - Instructional II	HS	Biology	FT	100	0
312	Yori, Cynthia	Yes	Grades PK-4 - Instructional I - Grades 5-6 - Instructional I	ES	Grade 5	FT	100	0
313	Yund, Nick	Yes	Citizenship 7-12 Social Studies 7-12 Grades 4-8 (All subjects 4-6 Social Studies 7-8) - Instructional I	MS	American Nation	FT	100	0
314	Zuri, William	Yes	Mathematics 7-12 - Instructional II	MS	Mathematics Grade 8	FT	100	0
	Total Number of Administrators (do not include CEO) 14							
	Total Number of Teachers 264		Counselors 15	School Nurses 3	Others 18			

**Preliminary Statement of Revenues, Expenditures & Fund Balances**  
**Include ALL Funds**  
**as of June 30, 2022**

Name of School PA Leadership Charter School

Address of School 1332 Enterprise Drive, West Chester, PA 19380

CEO Signature Mark G. Allen 7-15-22

**REVENUES**

<b>6000</b>		<b>REVENUE FROM LOCAL SOURCES</b>	
<b>6500</b>		<b>EARNINGS ON INVESTMENTS</b>	
	6510	Interest on Investments and Interest-Bearing Checking Accounts	772,929.79
	6520	Dividends on Investments	
	6530	Gains or Losses on Sale of Investments	(2,025,495.66)
	6540	Earnings on Investments in Real Property	
	6590	Other Earnings or Investments	(603,920.02)
<b>6600</b>		<b>FOOD SERVICE REVENUE</b>	
	6610	Daily Sales - Reimbursable Programs	
	6620	Daily Sales - Non-Reimbursable Programs	
	6630	Special Functions	
	6640	Non-Cash Contributions	
	6650	Price Reduction for Reduced Price and Free Meals (Debit)	
	6690	Other Food Service Revenues	
<b>6700</b>		<b>REVENUES FROM STUDENT ACTIVITIES</b>	
	6710	Admissions	
	6720	Bookstore Sales	
	6730	Student Organization Membership Dues and Fees	
	6740	Fees	33,414.62
	6750	Student Activity - Special Events	25,285.00
	6790	Other Student Activity Income	
<b>6800</b>		<b>REVENUES FROM INTERMEDIARY SOURCES / PASS THROUGH</b>	
	6810	Revenue from Local Governmental Units	
	6820	Revenue from Intermediary Sources - Commonwealth Funds	
	6830	Revenues from Intermediary Sources - Federal Funds	
	6890	Other Revenues from Intermediary Sources	
<b>6900</b>		<b>OTHER REVENUE FROM LOCAL SOURCES</b>	
	6910	Rentals	
	6920	Contributions & Donations from Private Sources / Capital Contributions	1,000.00



6930		Gains or Losses on Sale of Fixed Assets (Economic Resource	
6940		Tuition from Patrons	
	6941	Regular Day School Tuition	
	6942	Summer School Tuition	
	6943	Adult Education Tuition	
	6944	Receipts From Other LEAs in Pennsylvania - Education	62,750,611.86
	6945	Receipts from Out-of-State LEAs	
	6946	Receipts from Member Districts - AVTS / Special Program Jointure only	
	6947	Receipts from Members of Intermediate Units for Education by Withholding	
	6948	Receipts from Members of Intermediate Units for Direct Contributions	
	6949	Other Tuition from Patrons	
6950		Unassigned	
6960		Services Provide Other Local Governmental Units / LEAs	
	6961	Transportation Services Provided Other Pennsylvania LEAs	
	6969	All Other Services Provided Other Governments and LEAs Not Specified	
6970		Services Provided Other Funds	
6980		Revenue from Community Service Activities	
6990		Refunds and Other Miscellaneous Revenue	33,231.98
	6991	Refunds of a Prior Year Expenditure	19,145.49
	6999	Other Revenues Not Specified Above	
<b>7000</b>		<b>REVENUE FROM STATE SOURCES</b>	
7100		BASIC INSTRUCTIONAL AND OPERATING SUBSIDIES	
	7150	Unassigned	82,362.69
	7160	Tuition for Orphans and Children Placed in Private Homes	
	7180	Staff and Program Development	
7200		REVENUE FOR SPECIFIC EDUCATIONAL PROGRAMS	
	7210	Homebound Instruction	
	7220	Vocational Education	
	7230	Alternative Education	
	7240	Driver Education - Student	
	7250	Migratory Children	
	7260	Workforce Investment Act (WIA)	
	7270	Specialized Education of Exceptional Pupils	
	7280	Adult Literacy	
	7290	Additional Educational Program Revenues	
7300		REVENUES FOR NON-EDUCATIONAL PROGRAMS	
	7310	Transportation (Regular and Additional)	
	7320	Rental and Sinking Fund Payments / Building Reimbursement Subsidy	
	7330	Health Services (Medical, Dental, Nurse, Act 25)	
	7340	Unassigned	
	7350	Sewage Treatment Operations / Environmental Subsidies	
	7360	Safe Schools	
7400		VOCATIONAL TRAINING OF THE UNEMPLOYED	

7500		STATE REVENUE NOT LISTED ELSEWHERE IN THE 7000 SERIES OF	
	7502	Dual Enrollment Grants	
	7503	Project 720/High School Reform	
	7599	Other State Revenue Not Listed Elsewhere in the 7000 Series	
7600		REVENUE FOR MILK, LUNCH AND BREAKFAST PROGRAMS	
7800		REVENUE FOR THE COMMONWEALTH'S SHARE OF PAID BENEFITS	
	7810	State Share of Social Security and Medicare Taxes	
	7820	State Share of Retirement Contributions	
7900		REVENUE FOR TECHNOLOGY	
	7910	Educational Technology	
	7990	Other Technology Grants	
<b>8000</b>		<b>REVENUE FROM FEDERAL SOURCES</b>	
8100		UNRESTRICTED GRANTS-IN-AID DIRECT FROM THE FEDERAL	
	8110	Payments for Federally Impacted Areas - P.L. 81-874	
	8190	Other Unrestricted Federal Grants-in-Aid Direct from the Federal	
8200		UNRESTRICTED GRANTS-IN-AID FROM THE FEDERAL	
8300		RESTRICTED GRANTS-IN-AID DIRECTLY FROM THE FEDERAL	
	8310	Payments for Federally Impacted Areas - P.L. 81-815	
	8320	Energy Conservation Grants - TA and ECM	
	8390	Other Restricted Federal Grants-in-Aid Directly from the Federal	
8500		RESTRICTED GRANTS-IN-AID FROM THE FEDERAL GOVERNMENT	
	8510	Individuals with Disabilities Education Act (IDEA) and No Child Left Behind	1,821,573.02
	8520	Vocational Education	
	8530	Child Nutrition Program	
	8540	Nutrition Education and Training	
	8560	Federal Block Grants	
	8570	Unassigned	
	8580	Child Care and Development Block Grants	
	8590	Unassigned - 8700 series	2,293,547.29
8600		RESTRICTED GRANTS-IN-AID FROM THE FEDERAL GOVERNMENT THROUGH THE COMMONWEALTH FOR DRIVER EDUCATION, ADULT EDUCATION, CETA, HEADSTART, ENERGY CONSERVATION, WORKFORCE INVESTMENT ACT AND OTHER PROGRAMS	
	8610	Homeless Assistance Act	
	8620	Adult Basic Education	
	8640	Headstart	
	8650	Unassigned	
	8660	Workforce Investment Act (WIA)	

	8670	Unassigned	
	8680	Unassigned	
	8690	Other Restricted Federal Grants-in-Aid through the Commonwealth	
8800		MEDICAL ASSISTANCE REIMBURSEMENTS	
<b>9000</b>		<b>OTHER FINANCING SOURCES</b>	
9100		SALE OF BONDS	
	9110	Bond Issue Proceeds (Gross)	
	9120	Proceeds from Refunding of Bonds	
9200		PROCEEDS FROM EXTENDED TERM FINANCING	1,797,574.53
9300		INTERFUND TRANSFERS	
	9310	General Fund Transfers	
	9320	Special Revenue Fund Transfers	
	9330	Capital Projects Funds Transfers	
	9340	Debt Service Fund Transfers	
	9350	Enterprise Fund Transfers	
	9360	Internal Service Fund Transfers	
	9370	Trust and Agency Fund	
	9380	Activity Fund Transfers	
	9390	Permanent Fund Transfers	
9400		SALE OF OR COMPENSATION FOR LOSS OF FIXED ASSETS	
9500		Unassigned	
9600		Unassigned	
9700		TRANSFERS INVOLVING COMPONENT UNITS AND PRIMARY	
	9710	Transfers from Component Units	
	9720	Transfers from Primary Governments	
9800		INTRAFUND TRANSFERS IN	
	9810	General Fund Intrafund Transfers	
	9820	Special Revenue Intrafund Transfers	
	9840	Debt Service Intrafund Transfers	
	9850	Enterprise Intrafund Transfers	
	9860	Internal Service Intrafund Transfers	
	9870	Trust and Agency Intrafund Transfers	
	9880	Activity Interfund Transfers	
<b>TOTAL REVENUES</b>			<b>67,001,260.59</b>

**Preliminary Statement of Revenues, Expenditures & Fund Balances**  
**Include ALL Funds**  
**as of June 30, 2022**

Name of School PA Leadership Charter School

Address of School 1332 Enterprise Drive, West Chester, PA 19380

CEO Signature Mark G. Allen 7-15-22

Note-Expenditures may be submitted EITHER as accrual or cash basis

**EXPENDITURES**

<b>1000</b>	<b>INSTRUCTION</b>	
1100	REGULAR PROGRAMS - ELEMENTARY / SECONDARY	24,471,052.03
1200	SPECIAL PROGRAMS - ELEMENTARY / SECONDARY	7,993,311.13
1300	VOCATIONAL EDUCATION	
1400	OTHER INSTRUCTIONAL PROGRAMS - ELEMENTARY /	255,368.63
1600	ADULT EDUCATION PROGRAMS	
1700	HIGHER EDUCATION PROGRAMS	
1800	PRE-KINDERGARTEN	
<b>2000</b>	<b>SUPPORT SERVICES</b>	
2100	SUPPORT SERVICES - PUPIL PERSONNEL	
2110	Supervision of Pupil Personnel Services	
2120	Guidance Services	2,010,946.10
2130	Attendance Services	
2140	Psychological Services	
2150	Speech Pathology and Audiology Services	
2160	Social Work Services	
2170	Student Accounting Services	
2190	Other Pupil Personnel Services	2,436,125.98
2200	SUPPORT SERVICES - INSTRUCTIONAL STAFF	
2210	Supervision of Educational Media Services	259,985.24
2220	Technology Support Services	5,174,241.83
2230	Educational Television Services	
2240	Computer-Assisted Instruction Support Services	
2250	School Library Services	
2260	Instruction and Curriculum Development Services	

	2270	Instructional Staff Professional Development Services	165,120.48
	2280	Nonpublic Support Services	
2300		SUPPORT SERVICES - ADMINISTRATION	
	2310	Board Services	
	2320	Board Treasurer Services	
	2340	Staff Relations and Negotiations Services	
	2350	Legal Services	
	2360	Office of the Superintendent (Executive Director) Services	1,826,098.72
	2370	Community Relations Services	649,001.79
	2380	Office of the Principal Services	1,686,622.16
	2390	Other Administration Services	
2400		SUPPORT SERVICES - PUPIL HEALTH	342,654.66
2500		SUPPORT SERVICES - BUSINESS	
	2510	Fiscal Services	532,475.17
	2520	Purchasing Services	
	2530	Warehousing and Distributing Services	
	2540	Printing, Publishing and Duplicating Services	
	2590	Other Support Services - Business	
2600		OPERATION AND MAINTENANCE OF PLANT SERVICES	
	2610	Supervision of Operation and Maintenance of Plant Services	
	2620	Operation of Buildings Services	3,382,642.09
	2630	Care and Upkeep of Grounds Services	
	2640	Care and Upkeep of Equipment Services	
	2650	Vehicle Operations and Maintenance Services (Other than Student	
	2660	Security Services	
	2690	Other Operation and Maintenance of Plant Services	
2700		STUDENT TRANSPORTATION SERVICES	
	2710	Supervision of Student Transportation Services	
	2720	Vehicle Operation Services	
	2730	Monitoring Services	
	2740	Vehicle Servicing and Maintenance Services	
	2750	Nonpublic Transportation	
	2790	Other Student Transportation Services	
2800		SUPPORT SERVICES - CENTRAL	
	2810	Planning, Research, Development and Evaluation Services	
	2820	Information Services	
	2830	Staff Services	562,463.37
	2840	Data Processing Services	
	2850	State and Federal Agency Liaison Services	
	2860	Management Services	
	2890	Other Support Services Central	

2900		OTHER SUPPORT SERVICES - CENTRAL	
	2990	Pass-Thru Funds	
<b>3000</b>		<b>OPERATION OF NON-INSTRUCTIONAL SERVICES</b>	
3100		FOOD SERVICES	
3200		STUDENT ACTIVITIES	
	3210	School Sponsored Student Activities	36,916.21
	3250	School Sponsored Athletics	3,989.47
3300		COMMUNITY SERVICES	
	3310	Community Recreation	
	3320	Civic Services	
	3330	Public Library Services	
	3340	Custody and Child Care	
	3350	Welfare Activities	
	3390	Other Community Services	13,560.00
3400		SCHOLARSHIPS AND AWARDS	
<b>4000</b>		<b>FACILITIES ACQUISITION, CONSTRUCTION AND IMPROVEMENT</b>	
4100		SITE ACQUISITION SERVICES - ORIGINAL AND ADDITIONAL	
4200		EXISTING SITE IMPROVEMENT SERVICES	
4300		ARCHITECTURE AND ENGINEERING SERVICES / EDUCATIONAL SPECIFICATIONS DEVELOPMENT - ORIGINAL AND ADDITIONAL	
4400		ARCHITECTURE AND ENGINEERING SERVICES / EDUCATIONAL	
4500		BUILDING ACQUISITION AND CONSTRUCTION SERVICES -	
4600		EXISTING BUILDING IMPROVEMENT SERVICES	
<b>5000</b>		<b>OTHER EXPENDITURES AND FINANCING USES</b>	
5100		DEBT SERVICE / OTHER EXPENDITURES AND FINANCING USES	1,808,527.01
5200		FUND TRANSFERS	
5300		TRANSFERS INVOLVING COMPONENT UNITS	
5400		INTRAFUND TRANSFERS OUT	
5800		SUSPENSE ACCOUNT	
5900		BUDGETARY RESERVE	

<b>TOTAL EXPENDITURES</b>	<b>53,611,102.07</b>
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**TOTAL REVENUES MINUS TOTAL EXPENDITURES = CURRENT FUND  
BALANCE AS OF JUNE 30, 2022** 13,390,158.52

**Pennsylvania Leadership Charter School**

**Financial Statements  
And  
Independent Auditor's Report**

**Year Ended June 30, 2021**



**Pennsylvania Leadership Charter School  
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Year Ended June 30, 2021**

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## **Independent Auditor's Report**

To the Board of Trustees  
Pennsylvania Leadership Charter School  
West Chester, Pennsylvania

### **Report on the Financial Statements**

We have audited the accompanying financial statements of the governmental activities, the aggregate discretely presented component unit, and each major fund of Pennsylvania Leadership Charter School (the School), as of and for the year ended June 30, 2021 and the related notes to the financial statements, which collectively comprise the School's basic financial statements as listed in the table of contents.

### **Management's Responsibility for the Financial Statements**

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

### **Auditor's Responsibility**

Our responsibility is to express opinions on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements 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. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

### **Opinions**

In our opinion, the financial statements referred to above present fairly, in all material respects, the respective financial position of the governmental activities, the discretely presented component unit, and each major fund of Pennsylvania Leadership Charter School as of June 30, 2021, and the respective changes in financial position, and, where applicable, cash flows thereof for the year then ended in conformity with accounting principles generally accepted in the United States of America.

## Other Matters

### *Required Supplementary Information*

Accounting principles generally accepted in the United States of America require that the management's discussion and analysis, budgetary comparison information and pension and OPEB information as listed in the table of contents be presented to supplement the basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board, who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

### *Other Information*

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise Pennsylvania Leadership Charter School's basic financial statements. The schedule of expenditures of federal awards is presented for purposes of additional analysis as required by Title 2 U.S. *Code of Federal Regulations* (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, and is not a required part of the basic financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. The information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the schedule of expenditures of federal awards is fairly stated, in all material respects, in relation to the basic financial statements as a whole.

## Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated January 11, 2022 on our consideration of Pennsylvania Leadership Charter School's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Pennsylvania Leadership Charter School's internal control over financial reporting and compliance

*SD Associates P.C.*

Certified Public Accountants  
Elkins Park, Pennsylvania

January 11, 2022

# Pennsylvania Leadership Charter School Management's Discussion and Analysis June 30, 2021

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The Board of Trustees of Pennsylvania Leadership Charter School (the School) offers readers of the School's financial statements this narrative overview and analysis of the financial activities of the School for the fiscal year ended June 30, 2021. We encourage readers to consider the information presented here in conjunction with the School's financial statements.

## **Financial Highlights**

- Total revenues increased \$22,970,171 due primarily to increased student enrollment and rates.
- At the close of the current fiscal year, the School reports an ending fund balance of \$62,830,281. This balance was the result of a \$30,740,320 surplus for the year ended June 30, 2021.
- The School's cash balance at June 30, 2021 was \$37,002,501, representing an increase of \$16,356,303 from June 30, 2020.

## **Overview of the Financial Statements**

The discussion and analysis is intended to serve as an introduction to the School's basic financial statements. The School's basic financial statements as presented comprise four components: Management's Discussion and Analysis (this section), the basic financial statements, supplementary information, and single audit requirements.

### ***Government-Wide Financial Statements***

The government-wide financial statements are designed to provide readers with a broad overview of the School's finances, in a manner similar to a private-sector business.

The *statement of net position* presents information on all of the School's assets, deferred outflows of resources, liabilities and deferred inflows of resources, with the difference between the components (assets and deferred outflows of resources, less liabilities and deferred inflows of resources) reported as net position. Over time, increases or decreases in net position may serve as a useful indicator of whether the financial position of the School is improving or deteriorating.

The *statement of activities* presents information showing how the School's net position changed during the most recent fiscal year. All changes in net position are reported as soon as the underlying event giving rise to the change occurs, regardless of the timing of related cash flows.

The government-wide financial statements report on the function of the School that is principally supported by subsidies from school districts whose constituents attend the School.

### ***Component Unit***

The School includes Friends of Pennsylvania Leadership Charter School (Friends) in its report. Although legally separate, this component unit is important because of the nature of its relationship with the School.

# Pennsylvania Leadership Charter School Management's Discussion and Analysis June 30, 2021

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## Overview of the Financial Statements (continued)

### *Fund Financial Statements*

A *fund* is a group of related accounts that are used to maintain control over resources that have been segregated for specific activities or purposes. The School, like governmental type entities, utilizes fund accounting to ensure and demonstrate compliance with finance-related legal requirements. The School has two fund types, the governmental general fund and the fiduciary fund.

Most of the School's basic services are reported in governmental funds, which focus on how money flows into and out of those funds and the balances left at year-end that are available for spending. These funds are reported using an accounting method called *modified accrual* accounting, which measures cash and all other *financial* assets that can readily be converted to cash. Such information is useful in assessing the School's financing requirements. In particular, *fund balance* may serve as a useful measure of a government's net resources available for spending for program purposes at the end of the fiscal year.

The School is the fiduciary for its students' activities funds. The School's fiduciary assets and liabilities are reported in a separate Statement of Fiduciary Net Position. We exclude these assets and liabilities from the School's other financial statements because the School cannot use these assets to finance its operations. The School is responsible for ensuring that the assets reported in this fund are used for their intended purposes.

### *Notes to the Financial Statements*

The notes provide additional information that is essential to a full understanding of the data provided in the government-wide and fund financial statements.

### *Supplementary Information*

The governmental fund budgetary comparison schedule and pension and OPEB information is presented for purposes of additional analysis. The schedule of expenditures of federal awards is presented for purposes of additional analysis as required by Title 2 U.S. *Code of Federal Regulations* (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*.

### **Government-Wide Financial Analysis**

Management has adopted Governmental Accounting Standards Board (GASB) Statement 34 which requires a comparative analysis of current and prior periods.

**Pennsylvania Leadership Charter School  
Management's Discussion and Analysis  
June 30, 2021**

**Government-Wide Financial Analysis (continued)**

	<u>2021</u>	<u>2020</u>
<b>Assets</b>		
Current assets	\$ 40,261,363	\$ 24,624,742
Noncurrent assets	<u>35,831,772</u>	<u>18,227,485</u>
	76,093,135	42,852,227
<b>Deferred Outflows of Resources</b>	<u>4,129,706</u>	<u>3,039,477</u>
<b>Liabilities</b>		
Current liabilities	9,561,461	11,649,880
Long-term liabilities	<u>28,379,000</u>	<u>27,927,000</u>
	37,940,461	39,576,880
<b>Deferred Inflows of Resources</b>	<u>3,692,542</u>	<u>5,663,849</u>
<b>Net Position</b>	<u>\$ 38,589,838</u>	<u>\$ 650,975</u>

As noted earlier, net position may serve over time as a useful indicator of a government's financial position. In the case of the School, assets and deferred outflows of resources exceeds liabilities and deferred inflows of resources by \$38,589,838 as of June 30, 2021, an increase of \$37,938,863 from June 30, 2020.

The School's revenues are predominately local school district's funds based on the student enrollment. For the year ended June 30, 2021, the School's revenues of \$81,428,873 exceeded expenditures of \$43,490,010 by \$37,938,863, an increase of \$23,758,303 as compared to the preceding year.

	<u>2021</u>	<u>2020</u>
<b>Revenues</b>		
Program revenues		
Local educational agency assistance	\$ 75,059,564	\$ 49,798,883
State sources	52,701	61,171
Federal sources	1,755,867	1,317,804
General revenues		
Other sources	<u>4,560,741</u>	<u>256,644</u>
Total revenues	<u>81,428,873</u>	<u>51,434,502</u>

**Pennsylvania Leadership Charter School  
Management's Discussion and Analysis  
June 30, 2021**

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**Government-Wide Financial Analysis (continued)**

<b>Expenditures</b>		
Instruction	28,438,782	24,586,327
Support services	13,350,195	11,222,688
Noninstructional services	38,467	44,642
Interest expense	115,803	117,016
Depreciation-unallocated	1,546,763	1,283,269
Total expenditures	<u>43,490,010</u>	<u>37,253,942</u>
Change in net position	37,938,863	14,180,560
Net position, beginning	<u>650,975</u>	<u>(13,529,585)</u>
Net position, ending	<u>\$ 38,589,838</u>	<u>\$ 650,975</u>

**Governmental Fund**

The focus of the School's *governmental fund* is to provide information on near-term inflows, outflows, and balances of spendable resources. Such information is useful in assessing the School's financing requirements. In particular, *fund balance* may serve as a useful measure of a government's net resources available for spending for program purposes at the end of the fiscal year.

The School's governmental fund (the General Fund) reported an ending fund balance of \$62,830,281.

**Budget Variations**

The actual revenues represent an increase from budgeted revenues of \$28,171,204 due mainly to increased enrollment and an increase in rates.

Actual expenditures decreased \$456,116 from the budget due to a decrease in debt service costs, with increased instruction and support costs.

**Capital Asset and Debt Administration**

***Capital Assets***

Primary Government

As of June 30, 2021, the School's investment in capital assets for its governmental activities totaled \$6,199,503 (net of accumulated depreciation). This investment in capital assets includes building improvements, office furniture, and computer equipment.

Major capital assets purchases during the year included the following:

- Capital expenditures of \$2,059,118 for computer equipment.
- Capital expenditures of \$113,149 for furniture.
- Capital expenditures of \$307,132 for building improvements.



# Pennsylvania Leadership Charter School Management's Discussion and Analysis June 30, 2021

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## Capital Asset and Debt Administration (Continued) Capital Assets (Continued)

### Component Unit

As of June 30, 2021, Friend's capital assets totaled \$11,459,225 (net of accumulated depreciation). Capital assets include land and buildings

Additional information on the School's capital assets can be found in Note 4 of this report.

### *Long-Term Debt*

#### Primary Government

The School has numerous capital lease arrangements, which were entered into for the purchase of computer equipment. Additional information on the School's debt obligations can be found in Notes 7 and 8 of this report.

#### Component Unit

There was no debt related to Friends as of June 30, 2021.

## **Economic Factors and Next Year's Budgets and Rates**

The School is anticipating that its primary source of revenue, the per student subsidy provided by the local school districts, is expected to decrease by approximately \$12,800,000 (from \$74,600,000 down to \$61,800,000) for fiscal year 2021-2022 due to an anticipated decrease in enrollment from approximately 4,843 to 3,950. For fiscal year 2021-2022, per-student rates are expected to be on average, unchanged from 2020-2021. The decrease in enrollment is due substantially to district schools being able to re-open in fiscal year 2021-2022.

## **Future Events that will Financially Impact the School**

Anticipated enrollment for fiscal year 2021-2022 will be approximately 3,950 students. The resulting reduction in revenue (previous paragraph) may not be offset by concomitant decreases in costs, owing to the additional resources that may be needed to assist students in recovering from learning loss caused by the effects of COVID-19 on the school's operations. Those costs, however, are expected to be funded by additional federal government grants.

The fiscal and operational stability of our Commonwealth's charter schools is directly linked to the Commonwealth of Pennsylvania's budget. As noted in the notes to the financial statements, the COVID-19 health crisis has had an expected adverse effect on the Commonwealth's financial condition. This issue manifests itself most clearly in the way that the Commonwealth determines each charter school's per-pupil allotment which is calculated by student's school district of residence budgeted expenditures. To the extent that Commonwealth funds are reduced at the district level, this reduction will result in a reduction to charter school funding.

## **Contacting the School's Financial Management**

The financial report is designed to provide interested parties a general overview of the School's finances. Questions regarding any of the information provided in this report should be addressed to the Business Office, Pennsylvania Leadership Charter School, 1332 Enterprise Drive, West Chester, Pennsylvania 19380.

**Pennsylvania Leadership Charter School**  
**Statement of Net Position**  
**June 30, 2021**

	Primary Government	
	Governmental Activities	Component Unit
<b>Assets</b>		
Cash and investments	\$ 37,002,501	\$ 36,753
State subsidies receivable	53,398	-
Federal subsidies receivable	117,356	-
Local subsidies receivable	2,088,982	-
Prepaid expenses	999,126	-
Property and equipment, net	6,199,503	11,459,225
Due from Friends of PA Leadership Charter School	8,472,245	-
Investments	21,132,918	-
Security deposits	27,106	-
Total assets	<u>76,093,135</u>	<u>11,495,978</u>
<b>Deferred Outflows of Resources</b>		
Deferred outflows of resources	<u>4,129,706</u>	<u>-</u>
<b>Liabilities</b>		
Accounts payable and accrued expenses	7,063,354	-
Accrued compensated absences	74,800	-
Capital lease obligations		
Due within one year	1,253,327	-
Due after one year	1,169,980	-
Due to Pennsylvania Leadership Charter School	-	8,472,245
Net OPEB liability	1,199,000	-
Net pension liability	27,180,000	-
Total liabilities	<u>37,940,461</u>	<u>8,472,245</u>
<b>Deferred Inflows of Resources</b>		
Deferred inflows of resources	<u>3,692,542</u>	<u>-</u>
<b>Net Position</b>		
Invested in capital assets, net of related debt	3,776,196	-
Unrestricted	34,813,642	3,023,734
Total net position	<u>\$ 38,589,838</u>	<u>\$ 3,023,734</u>

See accompanying notes to financial statements.

**Pennsylvania Leadership Charter School**  
**Statement of Activities**  
**Year Ended June 30, 2021**

	Program Revenues		Net (Expense) Revenue and Changes in Net Position	
	Charges for Services	Grants and Contributions	Primary Government	
			Governmental Activities	Component Unit
<b>Functions</b>	<b>Expenses</b>			
<b>Governmental Activities</b>				
Instruction	\$ 28,438,782	\$ 51,080,518	\$ 1,755,867	\$ 24,397,603
Support services	13,350,195	23,979,046	52,701	10,681,552
Noninstructional services	38,467	44,922	-	6,455
Depreciation - unallocated	1,546,763	-	-	(1,546,763)
Interest expense	115,803	-	-	(115,803)
Total governmental activities	<u>43,490,010</u>	<u>75,104,486</u>	<u>1,808,568</u>	<u>33,423,044</u>
<b>Component Unit</b>				
Rental income and expense	\$ 243,681	\$ 997,025	\$ -	\$ 753,344
<b>General Revenues</b>				
Grants not restricted to specific programs			4,337,120	
Unrealized loss on investments			(236,871)	
Other revenues			415,570	
<b>Change in net position</b>			<u>37,938,863</u>	<u>753,344</u>
<b>Net Position - Beginning of Year</b>			<u>650,975</u>	<u>2,270,390</u>
<b>Net Position - End of Year</b>			<u>\$ 38,589,838</u>	<u>\$ 3,023,734</u>

See accompanying notes to financial statements.

**Pennsylvania Leadership Charter School  
Balance Sheet-Governmental Fund  
June 30, 2021**

	Total Governmental Funds
<b>Assets</b>	
Cash and cash equivalents	\$ 37,002,501
State subsidies receivable	53,398
Federal subsidies receivable	117,356
Local subsidies receivable	2,088,982
Prepaid expenses	999,126
Advance to Friends of PA Leadership Charter School	8,472,245
Investments	21,132,918
Security deposits	27,106
Total assets	\$ 69,893,632
<b>Liabilities</b>	
Accounts payable and accrued expenses	\$ 7,063,351
<b>Fund Balance</b>	
Nonspendable	8,499,351
Committed	40,159,822
Unassigned	14,171,108
	62,830,281
Total liabilities and fund balance	\$ 69,893,632

See accompanying notes to financial statements.

**Pennsylvania Leadership Charter School**  
**Reconciliation of the Balance Sheet of Governmental Funds**  
**To the Statement of Net Position**  
**June 30, 2021**

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**Total Fund Balance for Governmental Funds** \$ 62,830,281

Capital assets used in governmental activities are not financial resources and therefore are not reported in the funds. These assets consist of:

Property and equipment	16,325,838	
Accumulated depreciation	<u>(10,126,335)</u>	
		6,199,503

Long-term liabilities that pertain to governmental funds, including notes payable, are not due and payable in the current period and therefore are not reported as fund liabilities. All liabilities, both current and long-term, are reported in the statement of net position. Balances at year end are:

Capital lease obligations		(2,423,307)
Accounts payable and accrued expenses		(74,803)
Net pension liability		(27,180,000)
Net OPEB liability		(1,199,000)

Deferred outflows and inflows of resources are applicable to future periods and, therefore, are not reported in the funds.

Deferred inflows of resources		(3,692,542)
Deferred outflows of resources		<u>4,129,706</u>

**Total Net Position of Governmental Activities** **\$ 38,589,838**

**Pennsylvania Leadership Charter School**  
**Statement of Revenues, Expenditures, and Changes in Fund Balance-**  
**Governmental Fund**  
**Year Ended June 30, 2021**

	General Fund
<b>Revenues</b>	
Local education agency assistance	\$ 75,059,564
Federal sources	1,755,867
State sources	52,701
Unrealized loss on investments	(236,871)
Other sources	460,492
	77,091,753
<b>Expenditures</b>	
Instruction	30,272,273
Support services	14,170,372
Noninstructional services	38,467
Capital outlay	2,479,399
Debt service	1,571,228
	48,531,739
<b>Revenues in Excess of Expenditures</b>	28,560,014
<b>Other Financing Sources</b>	
Proceeds from capital leases	2,180,306
	30,740,320
<b>Net Change in Fund Balance</b>	30,740,320
<b>Fund Balance - Beginning of Year</b>	32,089,961
	\$ 62,830,281
<b>Fund Balance - End of Year</b>	\$ 62,830,281

See accompanying notes to financial statements.

**Pennsylvania Leadership Charter School  
Reconciliation of the Statement of Revenues, Expenditures, and  
Changes in Fund Balances of Governmental Funds to the  
Statement of Activities  
Year Ended June 30, 2021**

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**Net Change in Fund Balances - Total Governmental Funds** \$ 30,740,320

Capital outlays are reported in governmental funds as expenditures. However, in the statement of activities, the cost of those assets is allocated over their estimated useful lives as depreciation and amortization expense. This is the amount by which capital outlays exceeds depreciation in the current period.

Capital outlay	2,479,399	
Depreciation expense	(1,546,763)	
	932,636	

Proceeds from the Payroll Protection Program loan, which were recorded as grant revenue in the statement of revenues, expenditures, and changes in fund balance-governmental funds for the year ended June 30, 2020 based on the expenditures incurred for that year, and recorded as other financing sources for the portion to be spent during the year ended June 30, 2021, were forgiven during the year ended June 30, 2021. The amount forgiven includes interest accrued of \$7,220. 4,337,120

The governmental funds report note proceeds as financing sources, while repayment of note principal is reported as an expenditure. In the statement of net position, however, issuing debt increases long-term liabilities and does not affect the statement of activities and repayment of principal reduces the liability. The net effect of these differences in the treatment of notes payable is as follows:

Proceeds from capital leases	(2,180,306)	
Principal payments on long-term debt	1,455,425	
Change in accrued compensated absences	(21,188)	
Accounts payable and accrued expenses, long-term	65,320	
	(680,749)	

Governmental funds report School pension contributions as expenditures. However in the statement of activities, the cost of pension benefits earned net of employee contributions is reported as pension expense.

School pension and OPEB contributions	2,767,586	
Cost of benefits earned net of employee contributions	(158,050)	
	2,609,536	

**Change in Net Position of Governmental Activities** **\$ 37,938,863**

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See accompanying notes to financial statements.

**Pennsylvania Leadership Charter School**  
**Statement of Fiduciary Net Position**  
**Fiduciary Fund**  
**June 30, 2021**

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	<b>Agency Fund</b>
<b>Assets</b>	
Cash and cash equivalents	<u>\$ 11,645</u>
<b>Liabilities</b>	
Other current liabilities	<u>11,645</u>
<b>Net Position</b>	<u>\$ -</u>

See accompanying notes to financial statements.



**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

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**Note 1      Background and Summary of Significant Accounting Policies**

Pennsylvania Leadership Charter School (the School) is a nonprofit corporation established pursuant to the Pennsylvania Nonprofit Corporation Law of 1988. The mission of the school is to leverage technology on behalf of students who need a more personalized approach to education to maximize their potential and meet the highest performance standards. This mission is accomplished through a uniquely individualized learning program that combines the best in virtual education with very real connections among students, family, teachers, and the community. The School's charter expired at the end of the 2013-2014 school year, and has been extended while the Pennsylvania Department of Education processes the re-authorization application.

The financial statements of the School have been prepared in conformity with accounting principles generally accepted in the United States of America (GAAP) as applied to governmental units. The Governmental Accounting Standards Board (GASB) is the accepted standard-setting body for establishing governmental accounting and financial reporting principles. The more significant of the School's accounting policies are described below.

**Reporting Entity**

The School implemented Governmental Accounting Standards Board (GASB) Statement No. 61, *The Financial Reporting Entity: Omnibus (An Amendment to GASB No.'s 14 and 34)*. This Statement amends GASB Statement No. 14, *The Financial Reporting Entity* to provide additional guidance to determine whether certain organizations should be reported as component units based on the nature and significance of their relationship with the School.

As defined by generally accepted accounting principles established by the Governmental Accounting Standards Board, the financial reporting entity consists of the primary government, as well as its component unit, Friends of Pennsylvania Leadership Charter School (Friends).

Friends is a legally separate, tax-exempt component unit of the School. The School does not appoint the majority of the Board of Friends. Because Friends owns the buildings that are leased to the School for its operations, and because the School advanced funds to Friends for the acquisition of the buildings and for operating expenses without specified repayment terms, Friends is considered a component unit of the School. Friends is reported in separate financial statements because of the difference in its reporting model, as further described below.

Friends is a private nonprofit organization that reports its financial results in accordance with the Accounting Standards Codification (ASC). Most significant to Friend's operations and reporting model is ASC Topic 958, Not-for-Profit Entities. As such, certain revenue recognition criteria and presentation features are different from GASB revenue recognition criteria and presentation features.

As of June 30, 2021, the School had advanced \$8,472,245 to Friends in connection with the building acquisitions and operating costs.

**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

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**Note 1      Background and Summary of Significant Accounting Policies (continued)**

**Government-Wide and Fund Financial Statements**

The government-wide financial statements (the statement of net position and the statement of activities) report on the School as a whole. The statement of activities demonstrates the degree to which the direct expenses of the School's function are offset by program revenues.

The fund financial statements (governmental fund balance sheet and statement of governmental fund revenues, expenditures and changes in fund balance) report on the School's general fund.

**Measurement Focus, Basis of Accounting, and Financial Statement Presentation**

**Government-Wide Financial Statements:**

The government-wide financial statements are prepared using the economic resources measurement focus and the accrual basis of accounting as are the proprietary fund financial statements. Revenues are recorded when earned and expenses are recorded when a liability is incurred regardless of the timing of the related cash flows. Grants and similar items are recognized as soon as all eligibility requirements imposed by the provider have been met.

**Fund Financial Statements:**

Governmental fund financial statements are reported using the current financial resources measurement focus and the modified accrual basis of accounting. Revenues are recognized as soon as they are measurable and available. Revenues are considered to be available when they are collectible within the current period or soon enough thereafter to pay liabilities of the current period. For this purpose, the School considers revenues to be available if they are collected within 90 days of the end of the current period. Expenditures generally are recorded when a liability is incurred, as under accrual accounting.

The funds utilized by the School and brief descriptions of their accounting purposes are as follows:

*Governmental Fund* - The fund listed below is the fund through which most governmental functions are furnished.

General Fund – The General Fund is the operating fund of the School and accounts for all revenues and expenditures of the School.

*Fiduciary Funds*

Trust and Agency Funds - Trust and Agency Funds are used to account for assets held by the School in a trustee capacity or as an agent for individuals. Agency Funds are custodial in nature (assets equal liabilities) and do not involve measurement of results of operations.

**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

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**Note 1      Background and Summary of Significant Accounting Policies (continued)**

The School does not maintain any Trust Funds but maintains Agency Funds for the Activity Funds of student clubs, classes and organizations.

**Method of Accounting**

The School has adopted the provision of Statement No. 34 (“Statement 34”) of the Governmental Accounting Standards Board “*Basic Financial Statements – and Managements’ Discussion and Analysis – for State and Local Governments.*” Statement 34 established standards for external financial reporting for all state and local governmental entities, which includes a statement of net position, a statement of activities and changes in net position. It requires the classification of net position into three components – invested in capital assets, net of related debt; restricted; and unrestricted. These calculations are defined as follows:

- Invested in capital assets, net of related debt – This component of net position consists of capital assets, including restricted capital assets, net of accumulated depreciation and reduced by the outstanding balances of any bonds, mortgages, notes, or other borrowings that are attributable to the acquisition, construction, or improvement of those assets. If there are significant unspent related debt proceeds at year-end, the portion of the debt attributable to the unspent proceeds are not included in the calculation of invested in capital assets, net of related debt. Rather, that portion of the debt is included in the same net assets component as the unspent proceeds.
- Restricted – This component of net position consists of constraints placed on net asset use through external constraints imposed by creditors such as through debt covenants, grantors, contributors, or laws or regulations of other governments or constraints imposed by law through constitutional provisions or enabling legislation.
- Unrestricted net position – This component of net position consists of net assets that do not meet the definition of “restricted” or “invested in capital assets, net of related debt.”

When both restricted and unrestricted resources are available for use, it is the School's policy to use restricted resources first, then unrestricted resources as they are needed for the included program.

**Fund Balances - Governmental Funds**

The School elected to implement GASB No. 54, *Fund Balance Reporting and Governmental Type Definition*. In the fund financial statements, governmental funds report the following classifications of fund balance:

**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

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**Note 1      Background and Summary of Significant Accounting Policies (continued)**

**Fund Balances - Governmental Funds (continued)**

- Nonspendable - includes amounts that cannot be spent because they are either not spendable in form or are legally or contractually required to be maintained intact. The School classified employee advances, security deposits, and advance to Friends of PA Leadership Charter School as being nonspendable as these items are not expected to be converted to cash.
  
- Restricted - included amounts restricted by external sources, such as creditors or grantors, or by constitutional provision or enabling legislation.
  
- Committed - includes amounts that can only be used for specific purposes pursuant to constraints imposed by formal action of the Board of Trustees. The School committed \$32,300,000 towards future operating costs and funding issues, \$3,359,822 committed for building purchase, and \$4,500,000 towards the increasing costs of the PSERS retirement program.
  
- Assigned - includes amounts that the School intends to use for a specific purpose, but do not meet the definition of restricted or committed fund balance.
  
- Unassigned - includes all amounts that are not included in other spendable classifications.

When an expenditure is incurred for purposes for which both restricted and unrestricted fund balance is available, the School considers restricted funds to have been spent first. When an expenditure is incurred for which committed, assigned, or unassigned fund balances are available, the School considers amounts to have been spent first out of committed funds, then assigned funds, and finally unassigned funds, as needed, unless the Board of Trustees has provided otherwise in its commitment or assignment actions.

**Budgets and Budgetary Accounting**

Budgets are adopted on a basis consistent with accounting principles generally accepted in the United States of America. An annual budget is adopted for the General Fund.

The Budgetary Comparison Schedule should present both the original and the final appropriated budgets for the reporting period. The School only has a general fund budget; therefore, the original budget filed and accepted by the Pennsylvania Department of Education is the final budget as well.

**Use of Estimates**

The preparation of financial statements in conformity with U.S. generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements, and the reported amounts of revenues and expenses during the reporting period.

**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

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**Note 1      Background and Summary of Significant Accounting Policies (continued)**

**Use of Estimates (Continued)**

Actual results could differ from those estimates.

**Concentration of Credit Risk**

Periodically, the School may maintain deposits in excess of the Federal Deposit Insurance Corporation's limit of \$250,000, with financial institutions.

**Deposits and Investments**

The School's cash and cash equivalents are considered to be cash on hand and demand deposits. The School's investments consist of obligations of the U.S. Treasury, certain corporate bonds and certain exchange traded funds. Investments are reported at fair value.

**Prepaid Expenditures**

Prepaid expenditures include payments to vendors for services applicable to future accounting periods.

**Capital Assets**

Capital assets, which include property, plant and equipment, are reported in the government-wide financial statements. All capital assets are capitalized at cost and updated for additions and retirements during the year. The School does not possess any infrastructure. Improvements are capitalized; the cost of normal maintenance and repairs that do not add to the value of the asset or materially extend an asset's life are not. Capital assets of the School are depreciated using the straight-line method over the useful lives of the assets; leasehold improvements (7 - 39 years) and furniture and equipment (5 - 7 years).

**Long-Lived Assets**

The School and Friends evaluate long-lived assets, which include rental property subject to depreciation, for impairment whenever events or changes in circumstances indicate that the carrying value of an asset may not be recoverable. If the estimated future cash flows (undiscounted and without interest charges) from the use of an asset are less than the carrying value, a write-down would be recorded to reduce the related asset to its estimated fair value. Management has not identified any impairments at June 30, 2021.

**Deferred Outflows/Inflows of Resources**

Statement No. 63 provides guidance for reporting deferred outflows of resources, deferred inflows of resources, and net position in the statement of net position and related disclosures. In compliance with Statement No. 63, the statement of net position includes four components: assets, deferred outflows of

**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

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**Note 1      Background and Summary of Significant Accounting Policies (continued)**

**Deferred Outflows/Inflows of Resources (continued)**

resources, liabilities, and deferred inflows of resources.

Deferred outflows of resources represent a consumption of net position that applies to a future period and so will not be recognized as an outflow of resources (expense/expenditure) until then.

Deferred inflows of resources represent an acquisition of net position that applies to a future period and so will not be recognized as an inflow of resources (revenue) until that time.

**Advertising Costs**

All costs associated with advertising and promotions are recorded as expenditures in the year incurred.

**Income Tax Status**

The School is exempt from federal income taxes under Section 501(c)(3) of the Internal Revenue Service Code. The School follows the provisions of ASC 740-10, *Accounting for Uncertainty in Income Taxes*. Management evaluated the School's tax positions and concluded that the School had taken no uncertain tax positions that require adjustment to the financial statements to comply with the provisions of this guidance. The School files a Return of Organizations Exempt from Income Tax annually. The School's returns for 2018, 2019, and 2020 are subject to examination by the IRS, generally for three years after they were filed.

**Pensions**

For purposes of measuring the net pension liability, deferred outflows of resources and deferred inflows of resources related to pensions, and pension expense, information about the fiduciary net position of the Public School Employees' Retirement System (PSERS) and additions to/deductions from PSERS's fiduciary net position have been determined on the same basis as they are reported by PSERS. For this purpose, benefit payments (including refunds of employee contributions) are recognized when due and payable in accordance with the benefit terms. Investments are reported at fair value.

*General Information About the Pension Plan*

Plan Description

PSERS is a governmental cost-sharing multi-employer defined benefit pension plan that provides retirement benefits to public school employees of the Commonwealth of Pennsylvania. The members eligible to participate in the System include all full-time public school employees, part-time hourly public school employees who render at least 500 hours of service in the school year, and part-time per diem public school employees who render at least 80 days of service in the school year in any of the

**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

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**Note 1      Background and Summary of Significant Accounting Policies (Continued)**

**Pensions (Continued)**

reporting entities in Pennsylvania. PSERS issues a publicly available financial report that can be obtained at [www.psers.pa.gov](http://www.psers.pa.gov).

Benefits Provided

PSERS provides retirement, disability, and death benefits. Members are eligible for monthly retirement benefits upon reaching (a) age 62 with at least 1 year of credited service; (b) age 60 with 30 or more years of credited service; or (c) 35 or more years of service regardless of age. Act 120 of 2010 (Act 120) preserves the benefits of existing members and introduced benefit reductions for individuals who become new members on or after July 1, 2011. Act 120 created two new membership classes, Membership Class T-E (Class T-E) and Membership Class T-F (Class T-F). To qualify for normal retirement, Class T-E and Class T-F members must work until age 65 with a minimum of 3 years of service or attain a total combination of age and service that is equal to or greater than 92 with a minimum of 35 years of service. Benefits are generally equal to 2% or 2.5%, depending upon membership class, of the member's final average salary (as defined in the Code) multiplied by the number of years of credited service. For members whose membership started prior to July 1, 2011, after completion of five years of service, a member's right to the defined benefits is vested and early retirement benefits may be elected. For Class T-E and Class T-F members, the right to benefits is vested after ten years of service. Participants are eligible for disability retirement benefits after completion of five years of credited service. Such benefits are generally equal to 2% or 2.5%, depending upon membership class, of the member's final average salary (as defined in the Code) multiplied by the number of years of credited service. For members whose membership started prior to July 1, 2011, after completion of five years of service, a member's right to the defined benefits is vested and early retirement benefits may be elected. For Class T-E and Class T-F members, the right to benefits is vested after ten years of service.

Participants are eligible for disability retirement benefits after completion of five years of credited service. Such benefits are generally equal to 2% or 2.5%, depending upon membership class, of the member's final average salary (as defined in the Code), multiplied by the number of years of credited service, but not less than one-third of such salary nor greater than the benefit the member would have had at normal retirement age. Members over normal retirement age may apply for disability benefits.

Death benefits are payable upon the death of an active member who has reached age 62 with at least one year of credited service (age 65 with at least three years of credited service for Class T-E and Class T-F members) or who has at least five years of credited service (ten years for Class T-E and Class T-F members). Such benefits are actuarially equivalent to the benefit that would have been effective if the member had retired on the day before death.

**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

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**Note 1      Background and Summary of Significant Accounting Policies (Continued)**

**Pensions (Continued)**

Contributions

Member Contributions:

Active members who joined the System prior to July 22, 1983, contribute at 5.25% (Membership Class T-C) or at 6.50% (Membership Class T-D) of the member's qualifying compensation.

Members who joined the System on or after July 22, 1983, and who were active or inactive as of July 1, 2001, contribute at 6.25% (Membership Class T-C) or at 7.50% (Membership Class T-D) of the member's qualifying compensation.

Members who joined the System after June 30, 2001 and before July 1, 2011, contribute at 7.50% (automatic Membership Class T-D). For all new hires and for members who elected Class T-D membership, the higher contribution rates began with service rendered on or after January 1, 2002.

Members who joined the System after June 30, 2011, automatically contribute at the Membership Class T-E rate of 7.5% (base rate) of the member's qualifying compensation. All new hires after June 30, 2011, who elect Class T-F membership, contribute at 10.3% (base rate) of the member's qualifying compensation. Membership Class T-E and Class T-F are affected by a "shared risk" provision in Act 120 of 2010 that in future fiscal years could cause the Membership Class T-E contribution rate to fluctuate between 7.5% and 9.5% and Membership Class T-F contribution rate to fluctuate between 10.3% and 12.3%.

Employer Contributions:

The School's contractually required contribution rate for fiscal year ended June 30, 2021 was 33.51% of covered payroll, actuarially determined as an amount that, when combined with employee contributions, is expected to finance the costs of benefits earned by employees during the year, with an additional amount to finance any unfunded accrued liability. Contributions to the pension plan from the School were \$2,713,243 for the year ended June 30, 2021.

**Other Postemployment Benefits**

For purposes of measuring the net OPEB liability, deferred outflows of resources and deferred inflows of resources related to OPEB, and OPEB expense, information about the fiduciary net position of the Public School Employees' Retirement System (PSERS) and additions to/deductions from PSERS's fiduciary net position have been determined on the same basis as they are reported by PSERS. For this purpose, benefit payments are recognized when due and payable in accordance with the benefit terms. Investments are reported at fair value.



**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

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**Note 1      Background and Summary of Significant Accounting Policies (Continued)**

**Other Postemployment Benefits (Continued)**

*General Information about the Health Insurance Premium Assistance Program*

Health Insurance Premium Assistance Program

The System provides Premium Assistance which, is a governmental cost sharing, multiple-employer other postemployment benefit plan (OPEB) for all eligible retirees who qualify and elect to participate. Employer contribution rates for Premium Assistance are established to provide reserves in the Health Insurance Account that are sufficient for the payment of Premium Assistance benefits for each succeeding year. Effective January 1, 2002 under the provisions of Act 9 of 2001, participating eligible retirees are entitled to receive premium assistance payments equal to the lesser of \$100 per month or their out-of-pocket monthly health insurance premium. To receive premium assistance, eligible retirees must obtain their health insurance through either their school employer or the PSERS' Health Options Program. As of June 30, 2020 there were no assumed future benefit increases to participating eligible retirees.

Premium Assistance Eligibility Criteria

Retirees of the System can participate in the Premium Assistance program if they satisfy the following

- Have 24.5 or more years of service, or
- Are a disability retiree, or
- Have 15 or more years of service and retired after reaching superannuation age, and
- Participate of the HOP or employer-sponsored health insurance program.

Pension Plan Description

PSERS is a governmental cost-sharing multiple-employer defined benefit pension plan that provides retirement benefits to public school employees of the Commonwealth of Pennsylvania. The members eligible to participate in the System include all full-time public school employees, part-time hourly public school employees who render at least 500 hours of service in the school year, and part-time per diem public school employees who render at least 80 days of service in the school year in any of the reporting entities in Pennsylvania. PSERS issues a publicly available financial report that can be obtained at [www.psers.pa.gov](http://www.psers.pa.gov).

Benefits Provided

Participating eligible retirees are entitled to receive premium assistance payments equal to the lesser of \$100 per month or their out-of-pocket monthly health insurance premium. To receive premium assistance, eligible retirees must obtain their health insurance through either their school employer or the PSERS' Health Options Program. As of June 30, 2020 there were no assumed future benefit increases to participating eligible retirees.

**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

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**Note 1 Background and Summary of Significant Accounting Policies (Continued)**

**Other Postemployment Benefits (Continued)**

Employer Contributions

The school Schools' contractually required contribution rate for the fiscal year ended June 30, 2021 was 0.82% of covered payroll, actuarially determined as an amount that, when combined with employee contributions, is expected to finance the costs of benefits earned by employees during the year, with an additional amount to finance any unfunded accrued liability. Contributions to the OPEB plan from the School were \$66,394 for the year ended June 30, 2021.

**Note 2 Cash and Investments**

**Cash**

The School's cash and cash equivalents balance at June 30, 2021 was \$37,002,501. The actual amount of cash on deposit in the School's bank accounts at June 30, 2021 was \$37,029,071. As of June 30, 2021, the School's bank balance was exposed to custodial credit risk as follows:

Uninsured and uncollateralized	\$35,902,340
Insured amount	\$ 1,100,161

Custodial Credit Risk-Deposits

Custodial credit risk is the risk that in the event of a bank failure, the School's uninsured deposits may not be returned. The School does not have a policy for custodial credit risk.

**Investments**

At June 30, 2021, the School's investment balances were as follows:

Investment Type	Maturity	Fair Value	Rating
Agency Securities	Average - 11.75 years	\$ 329,483	AA+
Corporate Bonds	Average - 6.25 years	16,164,411	BBB+ (Average)
Municipal Bonds	Average - 8.5 years	249,760	AA
Certificates of Deposit	Average - 2 years	1,737,133	Not Rated
Exchange Traded Funds		2,652,131	Not Rated

Fair Value of Investments

The School measures and records its investments using fair value measurement guidelines established by generally accepted accounting principles. These guidelines recognize a three-tiered fair value hierarchy, as follows:

**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

**Note 2 Cash and Investments (Continued)**

**Investments (Continued)**

- Level 1: Quoted prices for identical investments in active markets;
- Level 2: Observable inputs other than quoted market prices; and,
- Level 3: Unobservable inputs.

As of June 30, 2021, all of the School's investments are classified in Level 1.

*Interest Rate Risk.* The School does not have any restrictions in any of its investment policies that limit investment maturities.

*Credit Risk.* The School's investment policy is to apply the "prudent investor" standard: "Investments shall be made with judgment and care, under circumstances then prevailing, which persons of prudence, discretion, and intelligence exercise in the management of their own affairs, not for speculation, but for investment, considering the probable safety of their capital as well as the probable income to be derived." Investment ratings are listed above.

*Concentration of Credit Risk.* The School places no limit on the amount that may be invested in any one issuer.

**Note 3 Receivables**

Receivables as of June 30, 2021 consist primarily of subsidies from federal, state, and local authorities. The School has established a reserve for uncollectible receivables of \$300,000 based on prior experience.

**Note 4 Capital Assets**

Capital asset activity for the year ended June 30, 2021 was as follows:

	Balance, 7/1/20	Additions	Dispositions	Balance, 6/30/21
Computer equipment	\$ 5,851,693	\$ 2,059,119	\$ -	\$ 7,910,812
Furniture	1,234,209	113,149	-	1,347,358
Equipment	356,776	-	-	356,776
Software	3,451,110	-	-	3,451,110
Building improvements	2,952,650	307,132	-	3,259,782
	13,846,438	2,479,400	-	16,325,838
Less: accumulated depreciation	8,579,572	1,546,763	-	10,126,335
	\$ 5,266,866	\$ 932,637	\$ -	\$ 6,199,503

Depreciation expense for the year ended June 30, 2021 was \$1,546,763.

**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

**Note 5 Bank Line of Credit**

The School maintains a \$2,000,000 line of credit from First Resource Bank. The line bears interest at 3.25%. The line is secured by School assets. As of June 30, 2021, \$2,000,000 was available to draw upon.

**Note 6 Funding**

The School receives funding from various local districts on a monthly basis based on enrollment. The rate of funding is determined on an annual basis. The School also received federal funding under various title grants.

**Note 7 Commitments**

**Operating Leases**

The School leases various facilities and equipment under operating agreements expiring through July, 2032. In addition to the basic rent, the school is required to pay all real estate taxes, occupancy costs, insurance and maintenance. Total rent expense for the year ended June 30, 2021 was \$1,484,815.

Future minimum lease payments as of June 30, 2021 are as follows:

Year Ending June 30,	Equipment	Facilities	Total
2022	\$ 101,644	\$ 1,220,311	\$ 1,321,955
2023	101,644	1,167,413	1,321,955
2024	101,644	997,013	1,269,057
2025	25,411	997,013	1,022,424
2026	-	997,013	997,013
Thereafter	-	3,494,470	3,494,470
	\$ 330,343	\$ 8,873,233	\$ 9,426,874

**Capital Lease Obligations**

Equipment, furniture and improvements costing \$4,368,804 with a net book value of \$3,218,687 are held under capital leases, with interest rates ranging from 4.7% to 6.4% per annum. The following is a schedule of future minimum lease payments required as of June 30, 2021:

Year Ending June 30,	Principal	Interest	Total
2022	\$ 1,253,327	\$ 89,019	\$ 1,342,346
2023	867,461	35,954	903,415
2024	302,519	4,042	306,561
	2,423,307	129,015	2,552,322
Less: current portion	1,253,327	89,019	1,342,346
	\$ 1,169,980	\$ 39,996	\$ 1,209,976

**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

**Note 8 Long-term Debt**

The School is a recipient of a Paycheck Protection Program (PPP) loan of \$4,329,900 granted by the Small Business Administration under the Coronavirus Aid, Relief and Economic Security Act (CARES Act). The loan accrues interest at 1% with no interest or principal due for the first six months. Interest of \$7,220 was accrued as of June 30, 2020 and added to the loan balance. The balance of the PPP loan plus accrued interest was forgiven during the year ended June 30, 2021.

The following is a summary of the changes in noncurrent liabilities reported in Statement of Net Position for the year ended June 30, 2021:

	Balance 7/1/2020	Additions	Reductions	Balance 6/30/2021	Due Within One Year
Obligations under capital leases	\$ 1,698,426	\$ 2,180,305	\$ 1,455,424	\$ 2,423,307	\$ 1,253,327
Payroll Protection Program	4,337,120	-	\$ 4,337,120	-	-
Compensated absences	53,612	21,188	-	74,800	-
Accrued expenses	65,321	-	65,321	-	-
	\$ 6,154,479	\$ 2,201,493	\$ 5,857,865	\$ 2,498,107	\$ 1,253,327

Interest expense was \$115,803 for the year ended June 30, 2021.

**Note 9 Related Party Transactions**

As of June 30, 2021, the School advanced \$8,472,245 to Friends for the purchase of the facilities and operating expenses. No stated interest rate or repayment terms exist.

The School leases its main facilities from Friends under operating leases expiring through July 2032 (see Note 7). Rent expense was \$997,013 for the year ended June 30, 2021.

**Note 10 Friends of Pennsylvania Leadership Charter School - Discretely Presented Component Unit**

Organization

Friends operates as a non-profit organization established under the laws of the Commonwealth of Pennsylvania to provide public educational school facilities, including land, buildings and improvements, for the benefit of the School.

**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

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**Note 10 Friends of Pennsylvania Leadership Charter School - Discretely Presented Component Unit  
(Continued)**

Financial Statement Presentation

Friends follows Financial Accounting Standards Board (FASB) Accounting Standards Codification (ASC) 958, Not-for-Profit Entities, which requires Friends to report net assets according to two classes: net assets without donor restrictions and net assets with donor restrictions. Net assets without donor restrictions are available for general use to support operations. Some donor restrictions are temporary in nature, such as those that will be met by the passage of time or programmatic purposes specified by the donor. Other donor imposed restrictions are perpetual in nature, where the donor stipulates that resources be maintained in perpetuity. There are no donor restrictions as of June 30, 2020. FASB ASC 958 also requires recognition of contributions, including donated services meeting certain criteria, at fair values. FASB ASC 958 establishes standards for general-purpose external financial statements for not-for-profit organizations.

Use of Estimates

The preparation of financial statements in conformity with GAAP requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements, and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

Income Tax Status

Friends is exempt from federal income taxes under Section 501(c)(3) of the Internal Revenue Code.

Uncertain Tax Positions

Friends recognizes and measures its unrecognized tax benefits in accordance with FASB ASC 740, *Income Taxes*. Using that guidance, tax positions initially need to be recognized in the financial statements when it is more likely than not that the positions will be sustained upon examination by the taxing authorities. It also provides guidance for derecognition, classification, interest and penalties, accounting in interim periods, disclosure, and transition.

As of June 30, 2021, Friends had no uncertain tax positions that qualified for either recognition or disclosure in the financial statements. Additionally, Friends had no interest or penalties related to income taxes. Friends files an income tax return in the U.S. federal jurisdiction.

Cash and Cash Equivalents

Friends considers all highly liquid instruments with original maturities of three months or less when purchased to be cash equivalents.

**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

**Note 10 Friends of Pennsylvania Leadership Charter School - Discretely Presented Component Unit  
(Continued)**

Capital Assets

Building and improvements are stated at cost, less accumulated depreciation. Expenditures for additions and betterments are capitalized; maintenance and repairs are charged to current operations as incurred. Depreciation has been calculated on such assets using the straight-line method over 39 years.

Capital Assets (Continued)

Capital asset activity for Friends for the year ended June 30, 2021 was as follows:

	Balance, 7/1/20	Additions	Dispositions	Balance, 6/30/21
Building	\$ 8,442,665	\$ 2,192,570	\$ -	\$ 10,635,235
Land	2,070,000	540,000	-	2,610,000
	10,512,665	2,732,570	-	13,245,235
Less: accumulated depreciation	1,569,531	216,479	-	1,786,010
	\$ 8,943,134	\$ 2,516,091	\$ -	\$ 11,459,225

Depreciation expense for the year ended June 30, 2021 was \$216,479.

Concentration of Credit Risk

Friends places its cash, which may at times be in excess of FDIC insurance limits, with high quality financial institutions and attempts to limit the amount of credit exposure with any one institution.

100% of the total rental revenue of Friends for the year ended June 30, 2021 was generated from the School through direct leased property.

Related-Party Arrangements

Friends leases its rental facilities to the School under long-term operating leases expiring through July 2032. Rent under the leases for the year ended June 30, 2021 was \$997,013. All costs of operating the facilities, such as utilities, assessments and taxes, etc., are paid by the School.

**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

**Note 10 Friends of Pennsylvania Leadership Charter School - Discretely Presented Component Unit (Continued)**

Future minimum lease payments are as follows as of June 30, 2021:

Year ending June 30,	
2022	\$ 997,013
2023	997,013
2024	997,013
2025	997,013
2026	997,013
Thereafter	3,494,470
	\$ 8,479,535

Related-Party Arrangements (Continued)

As of June 30, 2021, the School advanced \$8,472,245 to Friends for the purchase of the facilities and operating expenses. No stated interest rate or repayment terms exist.

**Note 11 Pension Liabilities, Pension Expense, and Deferred Outflows of Resources and Deferred Inflows of Resources Related to Pensions**

At June 30, 2021, the School reported a liability of \$27,180,000 for its proportionate share of the net pension liability. The net pension liability was measured as of June 30, 2020, and the total pension liability used to calculate the net pension liability was determined by rolling forward the System's total pension liability as of June 30, 2019 to June 30, 2020. The School's proportion of the net pension liability was calculated utilizing the employer's one-year reported covered payroll as it relates to the total one-year reported covered payroll. At June 30, 2021, the School's proportion was .0552%, which was a decrease of .0019% from its proportion measured as of June 30, 2020.

For the year ended June 30, 2021, the School recognized pension expense of \$158,050. At June 30, 2021, the School reported deferred outflows of resources and deferred inflows of resources related to pensions from the following sources:

	Deferred Outflows of Resources	Deferred Inflows of Resources
Net difference between projected and actual investment earnings	\$ 1,194,000	\$ -
Difference between expected and actual experience	71,000	651,000
Changes in proportions	-	2,818,000



**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

**Note 11 Pension Liabilities, Pension Expense, and Deferred Outflows of Resources and Deferred Inflows of Resources Related to Pensions (Continued)**

Difference between employer contributions and proportionate share of total contributions	23,070	-
Contributions subsequent to the measurement date	2,713,243	-
	\$ 4,001,313	\$ 3,469,000

The \$2,713,243 reported as deferred outflows of resources related to pensions resulting from School contributions subsequent to the measurement date will be recognized as a reduction of the net pension liability in the year ended June 30, 2021. Other amounts reported as deferred outflows of resources and deferred inflows of resources related to pensions will be recognized in pension expense as follows:

	Year Ending June 30:	
	2022	\$ (1,842,853)
	2023	\$ (821,482)
	2024	\$ 129,165
	2025	\$ 354,240

**Note 12 Actuarial Assumptions**

The total pension liability at June 30, 2020 was determined by rolling forward the System's total pension liability at June 30, 2019 to June 30, 2020 using the following actuarial assumptions, applied to all periods included in the measurement:

- Actuarial cost method - Entry Age Normal - level % of pay.
- The Investment Return - 7.25%, includes inflation at 2.75%
- Salary growth - effective average of 5.00%, comprised of inflation of 2.75% and 2.25% for real wage growth and for merit or seniority increases.
- Mortality rates were based on the RP-2014 Mortality Tables for Males and Females, adjusted to reflect PSERS' experience and projected using a modified version of the MP-2015 Mortality Improvement Scale.

The actuarial assumptions used in the June 30, 2020 valuation were based on the results of an actuarial experience study that was performed for the five year period ending June 30, 2015.

The long-term expected rate of return on pension plan investments was determined using a building-block method in which best-estimate ranges of expected future real rates of return (expected returns, net of pension plan investment expense and inflation) are developed for each major asset class. These ranges are combined to produce the long-term expected rate of return by weighting the expected future real rates of return by the target asset allocation percentage and by adding expected inflation.

**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

**Note 12 Actuarial Assumptions (Continued)**

The pension plan's policy in regard to the allocation of invested plan assets is established and may be amended by the Board. Plan assets are managed with a long-term objective of achieving and maintaining a fully funded status for the benefits provided through the pension.

<b>Asset Class</b>	<b>Target Allocation</b>	<b>Long-Term Expected Real Rate of</b>
Global public equity	15.0%	5.2%
Private equity	15.0%	7.2%
Fixed income	36.0%	1.1%
Commodities	8.0%	1.8%
Absolute return	10.0%	2.5%
Risk parity	8.0%	3.3%
Infrastructure/MLPs	6.0%	5.7%
Real Estate	10.0%	5.5%
Cash	6.0%	-1.0%
Financing (LIBOR)	-14.0%	-0.7%
	<b>100%</b>	

The above was the Board's adopted asset allocation policy and best estimates of geometric real rates of return for each major asset class as of June 30, 2020.

Discount Rate

The discount rate used to measure the total pension liability was 7.25%. The projection of cash flows used to determine the discount rate assumed that contributions from plan members will be made at the current contribution rate and that contributions from employers will be made at contractually required rates, actuarially determined. Based on those assumptions, the pension plan's fiduciary net position was projected to be available to make all projected future benefit payments of current plan members. Therefore, the long-term expected rate of return on pension plan investments was applied to all periods of projected benefit payments to determine the total pension liability.

Sensitivity of the School's Proportionate Share of the Net Pension Liability to Changes in the Discount Rate

The following presents the net pension liability, calculated using the discount rate of 7.25%, as well as what the net pension liability would be if it were calculated using a discount rate that is 1-percentage point lower (6.25%) or 1-percentage-point higher (8.25%) than the current rate:

**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

**Note 12 Actuarial Assumptions (Continued)**

	1% Decrease	Current Discount Rate 7.25%	1% Increase
School's proportionate share of the net pension liability	\$ 33,627,000	\$ 27,180,000	\$ 21,718,000

Pension Plan Fiduciary Net Position

Detailed information about PSERS' fiduciary net position is available in PSERS Comprehensive Annual Financial Report which can be found on the System's website at [www.psers.pa.gov](http://www.psers.pa.gov).

**Note 13 OPEB Liabilities, OPEB Expense, and Deferred Outflows of Resources and Deferred Inflows of Resources Related to OPEB**

At June 30, 2021, the School reported a liability of \$1,199,000 for its proportionate share of the net OPEB liability. The net OPEB liability was measured as of June 30, 2020, and the total OPEB liability used to calculate the net OPEB liability was determined by rolling forward the System's total OPEB liability as of June 30, 2019 to June 30, 2020. The School's proportion of the net OPEB liability was calculated utilizing the employer's one-year reported covered payroll as it relates to the total one-year reported covered payroll. At June 30, 2021, the School's proportion was .0555%, which was a decrease of .0016% from its proportion measured as of June 30, 2020.

For the year ended June 30, 2021, the School recognized OPEB expense of \$12,051. At June 30, 2021, the School reported deferred outflows of resources and deferred inflows of resources related to OPEB from the following sources:

	Deferred Outflows of Resources	Deferred Inflows of Resources
Changes in proportion	\$ -	\$ 198,000
Changes of assumptions	49,000	26,000
Difference between expected and actual experience	11,000	-
Net difference between projected and actual investment earnings	2,000	-
Difference between employer contributions and proportionate share of total contributions	-	(458)
Contributions subsequent to the measurement date	66,394	-
	\$ 128,394	\$ 223,542

**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

**Note 13 OPEB Liabilities, OPEB Expense, and Deferred Outflows of Resources and Deferred Inflows of Resources Related to OPEB (Continued)**

The \$66,394 reported as deferred outflows of resources related to OPEB resulting from School contributions subsequent to the measurement date will be recognized as a reduction of the net OPEB liability in the year ended June 30, 2021. Other amounts reported as deferred outflows of resources and deferred inflows of resources related to OPEB will be recognized in OPEB expense as follows:

	Year Ending June 30:		
	2022	\$	(43,902)
	2023	\$	(44,864)
	2024	\$	(44,857)
	2025	\$	(13,919)
	2026	\$	(14,000)

**Note 14 Actuarial Assumptions**

The Total OPEB Liability as of June 30, 2020, was determined by rolling forward the System's Total OPEB Liability as of June 30, 2019 to June 30, 2020 using the following actuarial assumptions, applied to all periods included in the measurement:

- Actuarial cost method - Entry Age Normal - level % of pay.
- Investment return - 2.79% - S&P 20 Year Municipal Bond Rate.
- Salary growth - Effective average of 5.00%, comprised of inflation of 2.75% and 2.25% for real wage growth and for merit or seniority increases.
- Premium Assistance reimbursement is capped at \$1,200 per year.
- Assumed Healthcare cost trends were applied to retirees with less than \$1,200 in premium assistance per year.
- Mortality rates were based on the RP-2014 Mortality Tables for Males and Females, adjusted to reflect PSERS' experience and projected using a modified version of the MP-2015 Mortality Improvement Scale.
- Participation rate:
  - Eligible retirees will elect to participate Pre age 65 at 50%
  - Eligible retirees will elect to participate Post age 65 at 70%

The actuarial assumptions used in the June 30, 2020 valuation were based on the results of an actuarial experience study that was performed for the five year period ending June 30, 2015.

The following assumptions were used to determine the contribution rate:

- The results of the actuarial valuation as of June 30, 2018 determined the employer contribution rate for fiscal year 2020.

**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

**Note 14 Actuarial Assumptions (Continued)**

- Cost Method: Amount necessary to assure solvency of Premium Assistance through the third fiscal year after the valuation date.
- Asset valuation method: Market Value.
- Participation rate: 63% of eligible retirees are assumed to elect premium assistance.
- Mortality rates and retirement ages were based on the RP-2000 Combined Healthy Annuitant Tables with age set back 3 for both males and females for healthy annuitants and for dependent beneficiaries. For disabled annuitants, the RP-2000 Combined Disabled Tables with age set back 7 years for males and 3 years for females for disabled annuitants. (A unisex table based on the RP-2000 Combined Healthy Annuitant Tables with age set back 3 years for both genders assuming the population consists of 25% males and 75% females is used to determine actuarial equivalent benefits.)

Investments consist primarily of short term assets designed to protect the principal of the plan assets. The expected rate of return on OPEB plan investments was determined using the OPEB asset allocation policy and best estimates of geometric real rates of return for each asset class.

The OPEB plan's policy in regard to the allocation of invested plan assets is established and may be amended by the Board. Under the program, as defined in the retirement code employer contribution rates for Premium Assistance are established to provide reserves in the Health Insurance Account that are sufficient for the payment of Premium Assistance benefits for each succeeding year.

OPEB - Asset Class	Target Allocation	Long-Term Expected Real Rate of Return
Cash	50.3%	-1.0%
US Core Fixed Income	46.5%	-0.1%
Non-US Developed Fixed	3.2%	-0.1%
	100%	

The above was the Board's adopted asset allocation policy and best estimates of geometrical real rates of return for each major asset class as of June 30, 2020.

Discount rate

The discount rate used to measure the Total OPEB Liability was 2.79%. Under the plan's funding policy, contributions are structured for short term funding of Premium Assistance. The funding policy sets contribution rates necessary to assure solvency of Premium Assistance through the third fiscal year after the actuarial valuation date. The Premium Assistance account is funded to establish reserves that are sufficient for the payment of Premium Assistance benefits for each succeeding year. Due to the short term funding policy, the OPEB plan's fiduciary net position was not projected to be sufficient to meet projected future benefit payments, therefore the plan is

**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

**Note 14 Actuarial Assumptions (Continued)**

considered a "pay-as-you-go" plan. A discount rate of 2.79% which represents the S&P 20 year Municipal Bond Rate at June 30, 2020, was applied to all projected benefit payments to measure the total OPEB liability.

Sensitivity of the System Net OPEB Liability to Change in Healthcare Cost Trend Rates

Healthcare cost trends were applied to retirees receiving less than \$1,200 in annual Premium Assistance. As of June 30, 2020, retirees Premium Assistance benefits are not subject to future healthcare cost increases. The annual Premium Assistance reimbursement for qualifying retirees is capped at a maximum of \$1,200. As of June 30, 2020, 93,693 retirees were receiving the maximum amount allowed of \$1,200 per year. As of June 30, 2020, 688 members were receiving less than the maximum amount allowed of \$1,200 per year. The actual number of retirees receiving less than the \$1,200 per year cap is a small percentage of the total population and has a minimal impact on Healthcare Cost Trends as depicted below.

The following presents the System net OPEB liability for June 30, 2020, calculated using current Healthcare cost trends as well as what the System net OPEB liability would be if health care cost trends were 1-percentage point lower or 1-percentage point higher than the current rate:

	Dollar Amounts in Thousands		
	1% Decrease	Current Trend Rate	1% Increase
System net OPEB liability	\$ 1,199,000	\$ 1,199,000	\$ 1,199,000

Sensitivity of the School's Proportionate Share of the OPEB liability to changes in the discount rate

The following presents the net OPEB liability, calculated using the discount rate of 2.79%, as well as what the net OPEB liability would be if it were calculated using a discount rate that is 1-percentage point lower (1.79%) or 1-percentage point higher (3.79%) than the current rate:

	1% Decrease	Current Discount	1% Increase
	1.79%	2.79%	3.79%
School's proportionate share of the net OPEB liability	\$ 1,367,000	\$ 1,199,000	\$ 1,060,000

OPEB plan fiduciary net position

Detailed information about PSERS' fiduciary net position is available in PSERS Comprehensive Annual Financial Report which can be found on the System's website at [www.psers.pa.gov](http://www.psers.pa.gov).

**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

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**Note 15 Retirement Plan**

The School also provides pension benefits through the Pennsylvania Leadership Charter School 403(b) Plan, a defined contribution plan (the Plan). All employees are eligible to participate. Participants make elective salary reduction contributions to the Plan. Mandatory employee contributions of 5% of eligible employee's compensation are also made by employees hired after July 1, 2014. The Plan provides for an employer contribution of 5% of compensation for employees who are contributing mandatory employee contributions. Employer contributions to the Plan for the year ended June 30, 2021 totaled \$674,592.

**Note 16 Grants**

The School participates in numerous state and federal grant programs, which are governed by various rules and regulations of the grantor agencies. Costs charged to the respective grant programs are subject to audit and adjustment by the grantor agencies; therefore, to the extent that the School has not complied with the rules and regulations governing the grants, refunds of any money received may be required and the collectability of any related receivable at June 30, 2021 may be impaired. In the opinion of the School, there are no significant contingent liabilities relating to compliance with the rules and regulations governing the respective grants; therefore, no provision has been recorded in the accompanying financial statements for such contingencies.

**Note 17 Risk Management**

The School is exposed to various risks of loss related to torts: theft of, damage to, and destruction of assets; errors and omissions; injuries to employees; and natural disasters. The School carries commercial insurance for such risks.

**Note 18 Litigation**

The School is involved in disputes with the several school districts regarding tuition payments received that were redirected from the Pennsylvania Department of Education (PDE). There are approximately 10 disputes regarding the School's request for redirection of funds, which are in the process of being consolidated by the Pennsylvania Department of Education for a hearing. The amount of funds in dispute is approximately \$650,000. At this time it cannot be determined how much, if any, will need to be repaid.

The School is, from time to time, involved in claims and lawsuits incidental to its operations. In the opinion of the administration and legal counsel, at this time, the ultimate resolution of these matters will not have an adverse effect on the financial position of the School.

**Pennsylvania Leadership Charter School**  
**Notes to Financial Statements**  
**June 30, 2021**

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**Note 19    Other Matters**

On January 30, 2020, the World Health Organization (“WHO”) announced a global health emergency because of a new strain of coronavirus (the “COVID-19 outbreak”) and the risks to the international community as the virus spread globally. In March 2020, the WHO classified the COVID-19 outbreak as a pandemic, based on the rapid increase in exposure globally. The outbreak and continuing effects of the COVID-19 health crisis in the Commonwealth has had and is expected to have a significantly adverse effect on the Commonwealth’s financial condition.



**Supplementary Information**

**Pennsylvania Leadership Charter School  
Governmental Fund Budgetary Comparison Schedule  
Year Ended June 30, 2021**

	<b>Budget</b>	<b>Actual Revenues/ Expenditures</b>	<b>Variance With Budget</b>
<b>Revenues</b>			
Local educational agency assistance	\$ 46,941,161	\$ 75,059,564	\$ 28,118,403
Payroll Protection Program income	-	-	-
State sources	41,465	52,701	11,236
Federal sources	1,829,923	1,755,867	(74,056)
Unrealized loss on investments		(236,871)	
Other sources	108,000	460,492	352,492
<b>Total revenues</b>	<b>48,920,549</b>	<b>77,091,753</b>	<b>28,171,204</b>
<b>Expenditures</b>			
Instruction	29,968,556	30,272,273	(303,717)
Support services	13,761,413	14,170,372	(408,959)
Noninstructional services	71,300	38,467	32,833
Capital outlay	2,410,804	2,479,399	(68,595)
Debt service	2,775,782	1,571,228	1,204,554
<b>Total expenditures</b>	<b>48,987,855</b>	<b>48,531,739</b>	<b>456,116</b>
<b>Revenues in Excess of Expenditures</b>	<b>(67,306)</b>	<b>28,560,014</b>	<b>(28,627,320)</b>
<b>Other Financing Sources</b>			
Proceeds from capital leases	1,734,277	2,180,306	446,029
<b>Net Change in Fund Balance</b>	<b>1,666,971</b>	<b>30,740,320</b>	<b>29,073,349</b>
<b>Fund Balance, Beginning</b>	<b>32,089,961</b>	<b>32,089,961</b>	<b>-</b>
<b>Fund Balance, Ending</b>	<b>\$ 33,756,932</b>	<b>\$ 62,830,281</b>	<b>\$ 29,073,349</b>

See accompanying notes to financial statements.

**Pennsylvania Leadership Charter School  
Schedule of the School's Proportionate Share of the Net  
Pension Liability and Contributions**

Last 10 Fiscal Years\*

Schedule of the School's Proportionate Share of the Net Pension Liability

Fiscal Year	PSERS Net Pension Liability		School's Covered Employee Payroll	School's Proportionate Share of NPL as a % of Covered- Employee Payroll	Plan Fiduciary Net Position as a % of Total Pension Liability
	School's Proportion	School's Proportionate Share			
6/30/2013	0.1005%	\$ 41,141,000	\$ 12,896,700	319.00%	54.49%
6/30/2014	0.1010%	\$ 39,977,000	\$ 12,892,589	310.08%	57.24%
6/30/2015	0.0818%	\$ 35,432,000	\$ 10,530,432	336.47%	54.36%
6/30/2016	0.0714%	\$ 35,384,000	\$ 9,247,797	382.62%	50.14%
6/30/2017	0.0641%	\$ 31,658,000	\$ 8,531,433	371.07%	51.84%
6/30/2018	0.0626%	\$ 31,051,000	\$ 8,429,289	368.37%	54.00%
6/30/2019	0.0571%	\$ 26,713,000	\$ 7,868,813	339.48%	55.66%
6/30/2020	0.0552%	\$ 27,180,000	\$ 7,786,342	349.07%	54.32%

Schedule of School Contributions

Fiscal Year	Contractually Required Contributions	Contributions Recognized by PSERS	Contribution Deficiency (Excess)	Covered- Employee Payroll	Contributions as a % of Total Covered- Employee Payroll
6/30/2015	\$ 2,117,367	\$ 2,117,367	\$ -	\$ 10,530,432	20.11%
6/30/2016	\$ 2,282,883	\$ 2,282,883	\$ -	\$ 9,247,797	24.69%
6/30/2017	\$ 2,413,467	\$ 2,413,467	\$ -	\$ 8,531,433	28.29%
6/30/2018	\$ 2,628,022	\$ 2,628,022	\$ -	\$ 8,429,289	31.18%
6/30/2019	\$ 2,526,712	\$ 2,526,712	\$ -	\$ 7,868,813	32.11%
6/30/2020	\$ 2,555,947	\$ 2,555,947	\$ -	\$ 7,786,342	32.83%
6/30/2021	\$ 2,713,243	\$ 2,713,243	\$ -	\$ 8,133,222	33.36%

\* This schedule is presented to illustrate the requirement to show information for 10 years. However, until a full 10-year trend is complete, available information is presented.

See accompanying notes to financial statements.

**Pennsylvania Leadership Charter School  
Schedule of the School's Proportionate Share of the Net  
OPEB Liability and Contributions**

Last 10 Fiscal Years\*

Schedule of the School's Proportionate Share of the Net OPEB Liability

Fiscal Year	PSERS Net OPEB Liability		School's Covered Employee Payroll	School's Proportionate Share of OPEB as a % of Covered- Employee Payroll	Plan Fiduciary Net Position as a % of Total OPEB Liability
	School's Proportion	School's Proportionate Share			
6/30/2016	0.0714%	\$ 1,538,000	\$ 9,247,797	16.63%	5.47%
6/30/2017	0.0641%	\$ 1,306,000	\$ 8,531,433	15.31%	5.73%
6/30/2018	0.0626%	\$ 1,306,000	\$ 8,429,289	15.49%	5.56%
6/30/2019	0.0571%	\$ 1,214,000	\$ 7,868,813	15.43%	5.56%
6/30/2020	0.0555%	\$ 1,199,000	\$ 7,786,342	15.40%	5.69%

Schedule of School Contributions

Fiscal Year	Contractually Required Contributions	Contributions Recognized by PSERS	Contribution Deficiency (Excess)	Covered- Employee Payroll	Contributions as a % of Total
					Covered- Employee Payroll
6/30/2018	\$ 69,723	\$ 69,723	\$ -	\$ 8,429,289	0.83%
6/30/2019	\$ 64,330	\$ 64,330	\$ -	\$ 7,868,813	0.82%
6/30/2020	\$ 64,358	\$ 64,358	\$ -	\$ 7,786,342	0.83%
6/30/2021	\$ 66,394	\$ 66,394	\$ -	\$ 7,904,048	0.84%

\* This schedule is presented to illustrate the requirement to show information for 10 years. However, until a full 10-year trend is complete, available information is presented.

See accompanying notes to financial statements.

**Pennsylvania Leadership Charter School  
Notes to Required Supplementary Information  
Year Ended June 30, 2021**

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**Note 1      Changes in Benefit Terms**

None.

**Note 2      Changes in Assumptions**

None.

**Other Reports Required By Government Auditing Standards**



**Independent Auditor's Report on Internal Control  
Over Financial Reporting and on Compliance and  
Other Matters Based on an Audit of Financial Statements  
Performed in Accordance with *Government Auditing Standards***

To the Board of Trustees  
Pennsylvania Leadership Charter School  
West Chester, Pennsylvania

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of the governmental activities, the aggregate discretely presented component unit, and each major fund of Pennsylvania Leadership Charter School (the School) as of and for the year ended June 30, 2021 and the related notes to the financial statements, which collectively comprise the School's basic financial statements and have issued our report thereon, dated January 11, 2022.

**Internal Control Over Financial Reporting**

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

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

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

**Compliance and Other Matters**

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

We noted certain matters that we reported to management of Pennsylvania Leadership Charter School in a separate letter dated January 11, 2022.

**Purpose of this Report**

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



Certified Public Accountants  
Elkins Park, Pennsylvania

January 11, 2022



## **Single Audit Requirements**

**Pennsylvania Leadership Charter School  
Schedule of Expenditures of Federal Awards  
Year Ended June 30, 2021**

Federal Grantor/ Pass-Through Grantor	Federal Assistance Listing Number	Pass- Through Grantor's Number	Grant Period	Program or Award	Total Received for the Year	Accrued (Deferred) 7/1/2020	Revenue Recognized	Federal Expenditures	Accrued (Deferred) Revenue 6/30/2021
U.S. Department of Education									
<u>Pass-Through PA Department of Education</u>									
Title I - Improving Basic Programs	84.010	013-211045	7/1/20-9/30/21	\$ 1,018,666	\$ 550,901	\$ -	\$ 586,725	\$ 586,725	\$ 35,824
Title I - Improving Basic Programs	84.010	013-201045	7/1/19-9/30/20	638,393	212,767	(36,939)	249,706	249,706	-
					763,668	(36,939)	836,431	836,431	35,824
Title II - Improving Teacher Quality	84.367	020-211045	7/1/20-9/30/21	137,124	72,558	-	109,035	109,035	36,477
Title II - Improving Teacher Quality	84.367	020-201045	7/1/19-9/30/20	86,210	8,567	(8,081)	16,648	16,648	-
					81,125	(8,081)	125,683	125,683	36,477
Title IV - Student Support and Academic Enrichment	84.424	144-211045	7/1/20-9/30/21	48,415	48,415	-	47,530	47,530	(885)
Title IV - Student Support and Academic Enrichment	84.424	144-201045	7/1/19-9/30/20	48,603	-	(6,013)	6,013	6,013	-
					48,415	(6,013)	53,543	53,543	(885)
Covid 19 Elementary and Secondary School Emergency Relief Fund	84.425	200-201045	3/13/20-9/30/21	524,341	193,178	-	128,352	128,352	(64,826)
Covid 19 Governor's Emergency Education Relief (GEER) Funds	84.425	254-201045	3/13/20-9/30/21	202,102	159,554	-	178,765	178,765	19,211
Covid 19 Special Education COVID 19 Impact Mitigation Grant	84.027	252-201045	7/1/20-9/30/21	9,212	5,528	-	9,212	9,212	3,684
<u>Pass-Through Chester County Intermediate Unit</u>									
Individuals with Disabilities Education									
Act Part B	84.027	N/A	7/1/20-9/30/21	329,518	241,647	-	329,518	329,518	87,871
Individuals with Disabilities Education	84.027	N/A	7/1/19-9/30/20	477,216	477,216	477,216	-	-	-
Act Part B	84.027	N/A	7/1/19-9/30/20	477,216	477,216	477,216	-	-	-
					724,391	477,216	338,730	338,730	91,555
Title III - Language Instruction for Limited English	84.031	N/A	7/1/20-9/30/21	4,363	4,363	-	4,363	4,363	-
Total U.S. Department of Education					1,974,694	426,183	1,665,867	1,665,867	117,356
U.S. Department of the Treasury									
<u>Pass-Through PA Commission on Crime and Delinquency</u>									
Covid 19 Coronavirus Relief Fund	21.019	N/A	3/1/20-10/30/20	90,000	90,000	-	90,000	90,000	-
Total U.S. Department of the Treasury					90,000	-	90,000	90,000	-
Totals					\$ 2,064,694	\$ 426,183	\$ 1,755,867	\$ 1,755,867	\$ 117,356

See notes to schedule of expenditures of federal awards.

**Pennsylvania Leadership Charter School  
Notes to Schedule of Expenditures of Federal Awards  
Year Ended June 30, 2021**

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**Note 1 Basis of Presentation**

The accompanying schedule of expenditures of federal awards (the Schedule) includes the federal award activity of Pennsylvania Leadership Charter School (the School) under programs of the federal government for the year ended June 30, 2021. The information in this schedule is presented in accordance with the requirements of Title 2 U.S. Code of Federal Regulations Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance)*. Because the Schedule presents only a selected portion of the operations of the School, it is not intended to and does not present the financial position, changes in net assets, or cash flows of the School.

**Note 2 Summary of Significant Accounting Policies**

(1) Expenditures reported on the Schedule are reported on the modified accrual basis of accounting. Such expenditures are recognized following the cost principles contained in the Uniform Guidance, wherein certain types of expenditures are not allowable or are limited as to reimbursement.

(2) Pass-through entity identifying numbers are presented where available

**Note 3 Indirect Cost Rate**

The School has elected not to use the 10% de minimis indirect cost rate allowed under the Uniform Guidance.



**Independent Auditor's Report on Compliance for Each Major Program and on Internal Control Over Compliance Required by the Uniform Guidance**

To the Board of Trustees  
Pennsylvania Leadership Charter School  
West Chester, Pennsylvania

**Report on Compliance for Each Major Federal Program**

We have audited Pennsylvania Leadership Charter School's (the School) compliance with the types of compliance requirements described in the *OMB Compliance Supplement* that could have a direct and material effect on each of the School's major federal programs for the year ended June 30, 2021. The School's major federal programs are identified in the summary of auditor's results section of the accompanying schedule of findings and questioned costs.

**Management's Responsibility**

Management is responsible for compliance with requirements of laws, regulations, contracts, and grants applicable to its federal programs.

**Auditor's Responsibility**

Our responsibility is to express an opinion on compliance for each of the School's major federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the audit requirements of Title 2 U.S. Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance). Those standards and the Uniform Guidance require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about the School's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each major federal program. However, our audit does not provide a legal determination of the School's compliance.

**Opinion on Each major Federal Program**

In our opinion, the School complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2021.

## Report on Internal Control Over Compliance

Management of the School is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered the School's internal control over compliance with the types of requirements that could have a direct and material effect on each major federal program to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing an opinion on compliance for each major federal program and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of the School's internal control over compliance.

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

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

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.



Certified Public Accountants  
Elkins Park, Pennsylvania

January 11, 2022

# Pennsylvania Leadership Charter School Schedule of Findings and Questioned Costs Year Ended June 30, 2021

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## A. Summary of Audit Results

1. The Independent Auditor's Report expresses an unmodified opinion on the basic financial statements of Pennsylvania Leadership Charter School.
2. No significant deficiencies or material weaknesses relating to the audit of the financial statements are reported in the Report on Compliance and on Internal Control over Financial Reporting.
3. No instances of noncompliance material to the financial statements of Pennsylvania Leadership Charter School which would be required to be reported in accordance with *Government Auditing Standards* were disclosed during the audit.
4. No significant deficiencies or material weaknesses relating to the audit of major federal award programs is reported in the Report on Compliance with Requirements Applicable to Each Major Program and Internal Control Over Compliance.
5. The independent auditor's report on compliance for the major federal award programs for Pennsylvania Leadership Charter School expresses an unmodified opinion.
6. There were no findings which were required to be reported in accordance with 2 CFR section 200.516(a).
7. The programs tested as major programs were IDEA, CFDA #84.27, and Elementary and Secondary School Emergency Relief Fund, CFDA #84.425.
8. The threshold for distinguishing Types A and B programs was \$750,000.
9. Pennsylvania Leadership Charter School qualifies as a low-risk auditee.

## B. Findings-Financial Statement Audit

None

## C. Findings and Questioned Costs-Major Federal Award Programs Audit

There were no findings and questioned costs for federal awards, which would include audit findings as defined in the Uniform Guidance.



**pennsylvania**  
DEPARTMENT OF EDUCATION

June 10, 2021

Dr. James Hanak

CEO

PA Leadership CS

1332 Enterprise Dr.

West Chester, PA 19380

Dear Dr. Hanak,

I thank you and your staff for participating in the Federal Programs Consolidated Review for the 2019-20 school year. Our monitoring provides a reasonable basis for our opinion on compliance for each major federal program. However, our monitoring results do not constitute a determination of Pennsylvania Leadership Charter School compliance. Based on the areas Division of Federal Program reviewed during its monitoring, we have uncovered no instances of non-compliance for the 2019-20 school year.

You may print off a copy of your completed Monitoring Instrument at <https://www.federalmonitor.com/pa> using the same username and password that you received in your monitoring notification letter sent to you in December/January. If you have any questions, please feel free to contact your regional coordinator.

Thank you for your cooperation.

Sincerely,

Susan McCrone  
Chief  
Division of Federal Programs

cc: Project File 2019-20

# CAV Home

**This is the 2019-2020 CAV for Pennsylvania Leadership Charter School**

**There are no issues that need to be addressed on this assessment.**

## Documents

No documents are currently available.



COMMONWEALTH OF PENNSYLVANIA  
DEPARTMENT OF EDUCATION  
333 Market Street Harrisburg, PA 17126-0333

Division of Federal Programs  
Consolidated Program Review

2019-2020 School Year

Pennsylvania Leadership Charter School  
1332 Enterprise Dr.  
West Chester, PA 19380

LEA Level Monitoring

	<u>Name</u>	<u>Phone Number</u>	Check if Interviewed
<b>Superintendent:</b>	James Hanak	610-701-3333	<input type="checkbox"/>
<b>Business Manager:</b>	Roger Masch	512-481-9777	<input checked="" type="checkbox"/>
<b>Federal Program Coordinator:</b>	Zofia Swiatek	610-701-3333	<input checked="" type="checkbox"/>
<b>Parent/Family Member:</b>			<input type="checkbox"/>

**Program(s) Reviewed:**

- |  |  |
|--|--|
| <input checked="" type="checkbox"/> Title IA: Program  | <input checked="" type="checkbox"/> Title IVA: Program |
| <input type="checkbox"/> Ed-Flex Waiver Review         | <input type="checkbox"/> Title VI-B REAP               |
| <input checked="" type="checkbox"/> Title IIA: Program | <input type="checkbox"/> Title VIII                    |

**Program Reviewer(s):** Adam Kenz

**Program Review Date:** 04/26/2021

# Title IA: Program

## Component I: Appropriately State Certified

The Local Education Agency (LEA) will ensure that all teachers and paraprofessionals working in a program supported with Title I funds meet applicable State certification and licensure requirements.

Section 1111(c)(6)

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
1. Teachers and paraprofessionals working in a Title I program are appropriately state certified.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> List of staff working in the Title IA program and their certifications. <input type="checkbox"/> Samples of valid level I or II certificated with appropriate content areas aligned with class schedules. <input type="checkbox"/> Emergency permits unacceptable except for Charter Schools - 25% rule <input type="checkbox"/> Report by the LEA data system on staff qualifications	
Desk monitoring only: Upload list of staff working in the Title IA program and their certifications.				<a href="#">Title I Program - Component I - Appropriately State Certified - Staff List with Certifications.pdf</a>	
If you have additional comments to make about this section, enter them here:					

## Component II: Equity Plan

The LEA will describe how low-income and minority children enrolled in Title I schools are not served at disproportionate rates by ineffective, out-of-field, or inexperienced teachers.

Section 1111(b)(2)

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<p>1. The LEA has developed an Equity plan that assures, through the implementation of various strategies, poor and minority students are not taught at higher rates than other students by inexperienced, unqualified, or out-of-field teachers in Title I schools.</p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Equity Plan and <b>dated</b> agenda and sign in sheets</li> <li><input checked="" type="checkbox"/> Documentation of annual review of Equity Plan</li> <li><input type="checkbox"/> Teachers are reassigned, if applicable</li> <li><input type="checkbox"/> Changes to union contract are made, if applicable</li> <li><input type="checkbox"/> Sample class schedules with applicable staff and student percentages</li> </ul>	
<p>Desk monitoring only: Upload Equity Plan and agendas and sign-in sheets for Equity Plan meetings.</p>	<a href="#">Title I Program - Component II - Equity Plan Review Agenda.pdf</a>				
<p>If you have additional comments to make about this section, enter them here:</p>					

**Component III: Foster Care**

The Local Education Agency (LEA) must develop and implement clear written procedures for how transportation will be provided, arranged, and funded for the duration of the time in foster care.

Section 1112(c)(5)

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments				
1. The LEA developed and signed transportation procedures for students in foster care.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Written transportation procedures with signatures	<table border="1"> <thead> <tr> <th data-bbox="1026 380 2047 431">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1026 431 2047 711">                     2/14/2020 10:23:29 AM                      Federal Program Coordinator Zofia Swiatek                      Pennsylvania Leadership Charter School is a cyber-school that serves students across the whole state. Due to the nature of our LEA, we do not have transportation procedures. It is our practice to provide local transportation for students for testing who are identified as either in foster care or who are homeless.                 </td> </tr> <tr> <th data-bbox="1026 711 2047 760">Monitor Comments</th> </tr> <tr> <td data-bbox="1026 760 2047 902">                     4/26/2021 6:43:17 AM                      Monitor Adem Oksuz                      Pennsylvania Leadership Charter School is a Cyber Charter School.                 </td> </tr> </tbody> </table>	District Comments	2/14/2020 10:23:29 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School is a cyber-school that serves students across the whole state. Due to the nature of our LEA, we do not have transportation procedures. It is our practice to provide local transportation for students for testing who are identified as either in foster care or who are homeless.	Monitor Comments	4/26/2021 6:43:17 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School is a Cyber Charter School.
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Monitor Comments									
4/26/2021 6:43:17 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School is a Cyber Charter School.									
Desk monitoring only: Upload written Foster Care Transportation procedures.									
If you have additional comments to make about this section, enter them here:									

**Component IV: Head Start Coordination Requirements**

Each LEA receiving Title I funds must carry out the activities described in subsection (b) with Head Start agencies and, if feasible, other entities carrying out early childhood development programs. Each LEA shall develop agreements with such Head Start agencies and other entities to carry out such activities.

Section 1119(a-c)

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments		
<p>1. The LEA developed a Memorandum of Understanding (MOU) with local Head Start agency(ies) that increase coordination. <b>Please note: If the LEA uploaded the MOU to eGrants, additional copies are not required. The monitor will view the MOU prior to monitoring. By checking this as met you are ensuring compliance with this requirement.</b></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<p><input type="checkbox"/> Signed MOU/written agreement between LEA and Head Start agency(ies)</p>	<table border="1"> <thead> <tr> <th data-bbox="1423 381 2043 431">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1423 431 2043 714"> <p>2/14/2020 10:24:48 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not partner with Head Start programs, as the LEA is a cyber charter school serving students throughout the entire state. Cyber charters are exempt from fulfilling this requirement.</p> </td> </tr> </tbody> </table>	District Comments	<p>2/14/2020 10:24:48 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not partner with Head Start programs, as the LEA is a cyber charter school serving students throughout the entire state. Cyber charters are exempt from fulfilling this requirement.</p>
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Desk monitoring only: Upload signed MOU.							
<p>If you have additional comments to make about this section, enter them here:</p>							

## Component V: Transition

Title I requires that activities be coordinated with outside agencies, when applicable, so that transitions from early childhood/preschool to kindergarten, middle school to high school, and high school to post-secondary education as well as school to work transitions are coordinated to prevent duplication of efforts or services.

Section 1112(b)(8)

Section 1112(b)(10)

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
1. The LEA implements strategies to facilitate effective transitions for students. <b>Please note: the LEA does not need to provide copies of the Consolidated Application; monitor will view prior to monitoring. By checking this as met you are ensuring compliance with this requirement.</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Consolidated Application Transition and Coordination section	
If you have additional comments to make about this section, enter them here:					

**Component VI: Parent and Family Engagement**

The LEA may receive funds under this part only if such agency conducts outreach to all parents and family members and implements programs, activities, and procedures for the involvement of parents and family members in programs. Such programs, activities, and procedures shall be planned and implemented with meaningful consultation with parents of Title I students.

Section 1116(a)(1-3)

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments			
<p>1. LEA has a written Parent and Family Engagement policy and evidence that it is reviewed and updated annually. Required Components:</p> <ul style="list-style-type: none"> <li>• description of how the LEA involves parents in the joint development of the Title I Plan (Title I Application)</li> <li>• description of how the LEA provides the coordination, technical assistance, and other support necessary to assist and build the capacity of all participating schools within the LEA in planning and implementing effective parent involvement and described in Section 1116 parent and family involvement activities to improve student academic achievement and school performance</li> <li>• description of how the LEA coordinates and integrates parent and family engagement strategies under Title I, Part A with parent and family engagement strategies, with other relevant Federal, State, and local laws and programs</li> <li>• description of how the LEA conducts with parents an annual evaluation of the content and effectiveness of the parent and family engagement policy in improving the academic quality of all school served under Title I, Part A, including identifying:</li> </ul>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> LEA Parent and Family Engagement policy with <b>review/revision</b> date. <b>Dated</b> parent meeting agenda and sign in sheet and evidence of distribution, examples website posting, handbook, mailing, etc.	<table border="1" style="width: 100%;"> <thead> <tr> <th data-bbox="1562 410 2062 467" style="text-align: center;">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1562 467 2062 711"> <p>4/9/2021 9:47:10 AM Federal Program Coordinator Zofia Swiatek Evaluation and Revision were done in Zoom. Recording can be shown day of audit.</p> </td> </tr> <tr> <td data-bbox="1562 711 2062 1101"> <p>4/9/2021 9:55:59 AM Federal Program Coordinator Zofia Swiatek Distribution of FERPA documents, Parent &amp; Family Engagement Policy, and School Parent Compact can be verified by looking at the linked images from our Shipping departments log of Academic Administration mailings.</p> </td> </tr> </tbody> </table>	District Comments	<p>4/9/2021 9:47:10 AM Federal Program Coordinator Zofia Swiatek Evaluation and Revision were done in Zoom. Recording can be shown day of audit.</p>	<p>4/9/2021 9:55:59 AM Federal Program Coordinator Zofia Swiatek Distribution of FERPA documents, Parent &amp; Family Engagement Policy, and School Parent Compact can be verified by looking at the linked images from our Shipping departments log of Academic Administration mailings.</p>
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Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<ul style="list-style-type: none"> <li>◦ barriers to greater participation in activities,</li> <li>◦ the needs of parents and family members to assist with the learning of their children, including engaging with school personnel and teachers</li> <li>◦ strategies to support successful school and family interactions</li> <li>• description of how the LEA uses the findings of the evaluation to design evidence-based strategies for more effective parental involvement, and how to revise, if necessary, the parent and family engagement policies, and</li> <li>• description of involvement of parents in the activities of the Title I schools.</li> </ul>					
<p>2. Each LEA shall reserve at least one percent of its Title I allocation to assist schools to carry out the activities in this section, unless the LEA receives less than \$500,000 in Title I funds. (This can be marked N/A in the LEA receives less than \$500,000 in Title I funds.) <b>Please note: the LEA does not need to provide copies of the Consolidated Application; monitor will view prior to monitoring. By checking this as met you are ensuring compliance with this requirement.</b></p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Consolidated Application, Reservation of Funds	
<p>3. Parents and family members of Title I students shall be involved in the decisions regarding how funds reserved are allotted for parental involvement activities. (This can be marked N/A if the LEA did not reserve funds for Parent and Family Engagement)</p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> <b>Dated</b> agendas and sign in sheets demonstrating parents were included in the decision on how to use the set aside	



Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<p>4. If the LEA received \$500,000 or more in Title I funds, the set aside funds shall be used to carry out activities and strategies consistent with the LEA Parent and Family Engagement Policy, <b>including at least one of the following:</b></p> <ul style="list-style-type: none"> <li>• supporting schools and nonprofit organizations in providing professional development for LEA and school personnel regarding parent and family engagement strategies.</li> <li>• supporting programs that reach parents and family members at home, in the community, and at school</li> <li>• disseminating information on best practices focused on parent and family engagement, especially best practices for increasing the engagement of economically disadvantaged parents and family members</li> <li>• collaborating, or providing subgrants to schools to enable such schools to collaborate with community-based or other organizations or employers with a record of success in improving and increasing parent and family engagement</li> <li>• engaging in any other activities and strategies that the LEA determines appropriate and consistent with the Parent and Family Engagement Policy. (This can be marked N/A if the LEA received \$500,000 or less in Title I funds.)</li> </ul>	☑	☐	☐	<p>☑ LEA Parent and Family Engagement policy, parent meeting agenda and sign in sheet</p>	
<p>5. LEA must conduct an annual evaluation of the content and effectiveness of the parent and family engagement policy use the findings of the evaluation to design evidence-based strategies for more effective parental involvement, and to revise, if necessary, the parent and family engagement policies.</p>	☑	☐	☐	<p>☑ Dated agenda and sign in sheets from meeting with parents to discuss the evaluation</p> <p>☐ Surveys and <b>collated</b> results to demonstrate evaluation process</p>	

Desk Monitoring only:

Title I Program - Component VI - Parents of Title I Students Invited to Meetings - Requirements 3 and 4.pdf

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<ul style="list-style-type: none"> <li>• Upload LEA Parent and Family Engagement Policy, parent meeting agendas and sign in sheets, method of distribution</li> <li>• Upload agendas and sign in sheets that demonstrate a discussion with parents and family members, and/or the survey and results.</li> </ul>				<p>Title I Program - Component VI - Parent and Family Engagement Policy Distribution Verificiation - Requirement 1 (1).jpg</p> <p>Title I Program - Component VI - Parent and Family Engagement Policy Distribution Verificiation - Requirement 1 (2).jpg</p> <p>Title I Program - Component VI - Parent and Family Engagement Policy Distribution Verificiation - Requirement 1 (3).jpg</p> <p>Title I Program - Component VI - Parent and Family Engagement Policy - Requirement 1 and 4.pdf</p>	
<p>If you have additional comments to make about this section, enter them here:</p>					

**Component VII: Schoolwide Programs**

A LEA may consolidate and use funds under this part, together with other Federal, State, and local funds, in order to upgrade the entire educational program of a school that serves an eligible school attendance area in which not less than 40 percent of the children are from low-income families, or not less than 40 percent of the children enrolled in the school are from such families.

Section 1114

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments				
1. The LEA is consolidating, not coordinating, funds (state, local, and federal) in the Schoolwide program. (If not applicable, mark N/A)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Approval letter from PDE	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th data-bbox="1535 410 2062 467" style="text-align: center;">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1535 467 2062 678">                     2/14/2020 10:21:19 AM                      Federal Program Coordinator Zofia Swiatek                      The LEA does not consolidate state, local, or federal funds                 </td> </tr> <tr> <th data-bbox="1535 678 2062 735" style="text-align: center;">Monitor Comments</th> </tr> <tr> <td data-bbox="1535 735 2062 907">                     4/26/2021 6:44:01 AM                      Monitor Adem Oksuz                      The LEA does not consolidate state, local, or federal funds                 </td> </tr> </tbody> </table>	District Comments	2/14/2020 10:21:19 AM Federal Program Coordinator Zofia Swiatek The LEA does not consolidate state, local, or federal funds	Monitor Comments	4/26/2021 6:44:01 AM Monitor Adem Oksuz The LEA does not consolidate state, local, or federal funds
District Comments									
2/14/2020 10:21:19 AM Federal Program Coordinator Zofia Swiatek The LEA does not consolidate state, local, or federal funds									
Monitor Comments									
4/26/2021 6:44:01 AM Monitor Adem Oksuz The LEA does not consolidate state, local, or federal funds									
Desk monitoring only: Upload Approval letter from PDE stating LEA can consolidate funds.									
If you have additional comments to make about this section, enter them here:									

**Component VIII: Nonpublic Schools**

The LEA provides Title I services to eligible children attending nonpublic schools.

Sections 1117, 8501, and 8503 Uniform Grants Guidance (UGG) Sec. 200.313 and 200.320

**If the LEA is not required to provide nonpublic services or the nonpublic official has declined services, this section can be skipped.**

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments				
<p>1. LEA has procedures for provision of services to eligible children attending nonpublic schools.  <b>Please note: the LEA does not need to provide copies of the Consolidated Application; monitor will view prior to monitoring. By checking this as met you are ensuring compliance with this requirement.</b></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<p><input type="checkbox"/> Consolidated application, Performance Goals section listing nonpublic student's measurable goals and detailing the services provided to nonpublic students.</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th data-bbox="1644 440 2045 483" style="text-align: center;">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1644 483 2045 764"> <p>2/14/2020 10:30:56 AM                      Federal Program Coordinator                      Zofia Swiatek                      Pennsylvania Leadership Charter School does not partner with non-public school entities.</p> </td> </tr> <tr> <th data-bbox="1644 764 2045 808" style="text-align: center;">Monitor Comments</th> </tr> <tr> <td data-bbox="1644 808 2045 1047"> <p>4/26/2021 6:45:21 AM                      Monitor Adem Oksuz                      The LEA is a cyber charter school and not required to partner with nonpublic schools.</p> </td> </tr> </tbody> </table>	District Comments	<p>2/14/2020 10:30:56 AM                      Federal Program Coordinator                      Zofia Swiatek                      Pennsylvania Leadership Charter School does not partner with non-public school entities.</p>	Monitor Comments	<p>4/26/2021 6:45:21 AM                      Monitor Adem Oksuz                      The LEA is a cyber charter school and not required to partner with nonpublic schools.</p>
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Monitor Comments									
<p>4/26/2021 6:45:21 AM                      Monitor Adem Oksuz                      The LEA is a cyber charter school and not required to partner with nonpublic schools.</p>									

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
2. Consultation has occurred between LEA and nonpublic officials.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Copies of letters, e-mails, consultation forms, meeting sign-in sheets between LEA and nonpublic officials <input type="checkbox"/> Consolidated application Nonpublic Involvement section showing record of contacts between LEA and nonpublic schools	<div style="background-color: #cccccc; text-align: center; padding: 2px;"><b>District Comments</b></div> <p>2/14/2020 10:30:59 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not partner with non-public school entities.</p> <div style="background-color: #cccccc; text-align: center; padding: 2px;"><b>Monitor Comments</b></div> <p>4/26/2021 6:45:34 AM Monitor Adem Oksuz The LEA is a cyber charter school and not required to partner with nonpublic schools.</p>
3. The results of agreement following consultation have been transmitted to the SEA's equitable services ombudsman.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Affirmation of Consultation <input type="checkbox"/> eGrants affirmation upload <input type="checkbox"/> LEA documentation that consultation has, or attempts at such consultation have, taken place <input type="checkbox"/> Emails, Return Receipt mail card, and/or Certified Letter postage receipt are required ONLY if the LEA does not have/nonpublic official fails to sign the affirmation.	<div style="background-color: #cccccc; text-align: center; padding: 2px;"><b>District Comments</b></div> <p>2/14/2020 10:31:03 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not partner with non-public school entities.</p> <div style="background-color: #cccccc; text-align: center; padding: 2px;"><b>Monitor Comments</b></div> <p>4/26/2021 6:45:38 AM Monitor Adem Oksuz The LEA is a cyber charter school and not required to partner with nonpublic schools.</p>

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
4. LEA regularly monitors the provision of Title I services to nonpublic students.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Visitation log <input type="checkbox"/> Evaluation data <input type="checkbox"/> Assessment data	<div style="background-color: #cccccc; padding: 2px;"><b>District Comments</b></div> <p>2/14/2020 10:31:05 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not partner with non-public school entities.</p> <div style="background-color: #cccccc; padding: 2px;"><b>Monitor Comments</b></div> <p>4/26/2021 6:46:18 AM Monitor Adem Oksuz The LEA is a cyber charter school and not required to partner with nonpublic schools.</p>
5. LEA is evaluating the Title I program serving nonpublic school students.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Evaluation data <input type="checkbox"/> Needs assessment, survey form and collated results <input type="checkbox"/> Assessment data	<div style="background-color: #cccccc; padding: 2px;"><b>District Comments</b></div> <p>2/14/2020 10:31:09 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not partner with non-public school entities.</p> <div style="background-color: #cccccc; padding: 2px;"><b>Monitor Comments</b></div> <p>4/26/2021 6:45:42 AM Monitor Adem Oksuz The LEA is a cyber charter school and not required to partner with nonpublic schools.</p>

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<p>6. Nonpublic school students are receiving equitable services as discussed during consultation and Parent &amp; Family Engagement if allocation is \$500,000 and over. <b>Please note: the LEA does not need to provide copies of the Consolidated Application; monitor will view prior to monitoring. By checking this as met you are ensuring compliance with this requirement.</b></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<p><input type="checkbox"/> Nonpublic Organizations Summary and Nonpublic Institutions sections of eGrants</p> <p><input type="checkbox"/> Announcements/sign-in sheets for Parent &amp; Family Engagement opportunities for nonpublic teachers and parents as applicable</p>	<p style="text-align: center;"><b>District Comments</b></p> <p>2/14/2020 10:31:12 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not partner with non-public school entities.</p> <p style="text-align: center;"><b>Monitor Comments</b></p> <p>4/26/2021 6:46:23 AM Monitor Adem Oksuz The LEA is a cyber charter school and not required to partner with nonpublic schools.</p>
<p>7. LEA's budget documents appropriate set-asides. <b>Please note: the LEA does not need to provide copies of the Consolidated Application; monitor will view prior to monitoring. By checking this as met you are ensuring compliance with this requirement.</b></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<p><input type="checkbox"/> Title I budget/Budget Summary section of eGrants</p>	<p style="text-align: center;"><b>District Comments</b></p> <p>2/14/2020 10:31:15 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not partner with non-public school entities.</p> <p style="text-align: center;"><b>Monitor Comments</b></p> <p>4/26/2021 6:45:47 AM Monitor Adem Oksuz The LEA is a cyber charter school and not required to partner with nonpublic schools.</p>

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<p>8. If LEA has Nonpublic Carryover funds, there is evidence to demonstrate Nonpublic school(s) were consulted.</p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<p><input type="checkbox"/> Carryover section of eGrants and copies of letters, e-mails, consultation forms, meeting sign-in sheets between LEA and nonpublic officials</p>	<p style="text-align: center;"><b>District Comments</b></p> <p>2/14/2020 10:31:17 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not partner with non-public school entities.</p> <p style="text-align: center;"><b>Monitor Comments</b></p> <p>4/26/2021 6:46:27 AM Monitor Adem Oksuz The LEA is a cyber charter school and not required to partner with nonpublic schools.</p>
<p>9. LEAs are properly monitoring the distribution and use of equipment and supplies purchased for the purposes of providing equitable services to eligible private school students.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<p><input type="checkbox"/> Inventory list of items purchased with Title I A nonpublic funds</p> <p><input type="checkbox"/> Documentation that a physical inventory is <b>conducted annually at the end of the school year</b></p>	<p style="text-align: center;"><b>District Comments</b></p> <p>2/14/2020 10:31:20 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not partner with non-public school entities.</p> <p style="text-align: center;"><b>Monitor Comments</b></p> <p>4/26/2021 6:45:51 AM Monitor Adem Oksuz The LEA is a cyber charter school and not required to partner with nonpublic schools.</p>



Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments				
<p>10. LEA has third-party contracts (per Uniform Grants Guidance / Procurement procedures) that include the proportionate share of Title I funds determined by eGrants.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<p><input type="checkbox"/> Copy of third-party contracts that include a breakdown of instructional costs, amount of services to be delivered, administrative costs for nonpublic schools and multi-year contracts DO NOT exceed three years and contain an exit clause.</p>	<table border="1"> <thead> <tr> <th data-bbox="1642 131 2049 180">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1642 180 2049 461"> <p>2/14/2020 10:31:24 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not partner with non-public school entities.</p> </td> </tr> <tr> <th data-bbox="1642 461 2049 509">Monitor Comments</th> </tr> <tr> <td data-bbox="1642 509 2049 751"> <p>4/26/2021 6:45:55 AM Monitor Adem Oksuz The LEA is a cyber charter school and not required to partner with nonpublic schools.</p> </td> </tr> </tbody> </table>	District Comments	<p>2/14/2020 10:31:24 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not partner with non-public school entities.</p>	Monitor Comments	<p>4/26/2021 6:45:55 AM Monitor Adem Oksuz The LEA is a cyber charter school and not required to partner with nonpublic schools.</p>
District Comments									
<p>2/14/2020 10:31:24 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not partner with non-public school entities.</p>									
Monitor Comments									
<p>4/26/2021 6:45:55 AM Monitor Adem Oksuz The LEA is a cyber charter school and not required to partner with nonpublic schools.</p>									
<p>11. Evidence LEA is following procurement procedures when the LEA is using a third-party provider for nonpublic equitable services.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<p><input type="checkbox"/> Informal quotes or RFPs</p>	<table border="1"> <thead> <tr> <th data-bbox="1642 768 2049 816">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1642 816 2049 1097"> <p>2/14/2020 10:31:26 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not partner with non-public school entities.</p> </td> </tr> <tr> <th data-bbox="1642 1097 2049 1146">Monitor Comments</th> </tr> <tr> <td data-bbox="1642 1146 2049 1382"> <p>4/26/2021 6:46:33 AM Monitor Adem Oksuz The LEA is a cyber charter school and not required to partner with nonpublic schools.</p> </td> </tr> </tbody> </table>	District Comments	<p>2/14/2020 10:31:26 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not partner with non-public school entities.</p>	Monitor Comments	<p>4/26/2021 6:46:33 AM Monitor Adem Oksuz The LEA is a cyber charter school and not required to partner with nonpublic schools.</p>
District Comments									
<p>2/14/2020 10:31:26 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not partner with non-public school entities.</p>									
Monitor Comments									
<p>4/26/2021 6:46:33 AM Monitor Adem Oksuz The LEA is a cyber charter school and not required to partner with nonpublic schools.</p>									

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<p>12. LEA has Title I complaint procedures available for nonpublic schools.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<p><input type="checkbox"/> Copy of Complaint Procedure and verification of distribution to nonpublic schools</p>	<p style="text-align: center;"><b>District Comments</b></p> <p>2/14/2020 10:31:29 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not partner with non-public school entities.</p> <p style="text-align: center;"><b>Monitor Comments</b></p> <p>4/26/2021 6:46:00 AM Monitor Adem Oksuz The LEA is a cyber charter school and not required to partner with nonpublic schools.</p>
<p>13. Transferability Sec. 5103(b)</p> <p>Up to 100% of Title II and IV funds can be transferred. Funds can be transferred into Title I and Title III but not out of either subprogram. Title IIA and IV can transfer between programs. (Complete only if transfer) Evidence of Nonpublic school consultation to discuss transferred amounts</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<p><input type="checkbox"/> Agendas/sign in sheets</p> <p><input type="checkbox"/> Emails</p> <p><input type="checkbox"/> Other documentation to reflect nonpublic consultation occurred prior to the transfer of funds.</p>	<p style="text-align: center;"><b>District Comments</b></p> <p>2/14/2020 10:31:31 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not partner with non-public school entities.</p> <p style="text-align: center;"><b>Monitor Comments</b></p> <p>4/26/2021 6:46:04 AM Monitor Adem Oksuz The LEA is a cyber charter school and not required to partner with nonpublic schools.</p>
<p>Desk monitoring only:</p>					

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<ul style="list-style-type: none"> <li>• Upload Copies of letters, e-mails, consultation forms, or meeting sign-in sheets between LEA and nonpublic officials to demonstrate services have been discussed</li> <li>• Upload sign in sheets or visitation logs to demonstrate LEA monitored Nonpublic school</li> <li>• Upload evaluation data, assessment data, or the needs assessment survey to demonstrate LEA evaluated Nonpublic Title I program.</li> <li>• Upload third party contracts</li> <li>• Upload complaint procedures</li> </ul>					
<p>If you have additional comments to make about this section, enter them here:</p>					

**Component IX: Targeted Support and Improvement (TSI) Plans**

Schools are encouraged to create a multiyear plan. The deadline for TSI schools to have their plan complete is the end of their school year. Plans must be board approved, but not approved by PDE. If the LEA is in recovery or receivership the Chief Recovery Officer or Receiver must sign off.

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Additional Evidence	Comments		
1. Each TSI school must have either a completed plan or can demonstrate progress towards completing the plan.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Written plan <input checked="" type="checkbox"/> evidence of progress such as stakeholder and/or planning meetings, agendas and/or sign in sheets		<table border="1" style="width: 100%;"> <thead> <tr> <th data-bbox="1425 305 2062 362" style="text-align: center;">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1425 362 2062 613">           4/9/2021 8:31:40 AM            Federal Program Coordinator Zofia Swiatek            There is no upload feature for this component, but a plan is available in the FRCPP, as well as by request. I can email or share our plan at any time.         </td> </tr> </tbody> </table>	District Comments	4/9/2021 8:31:40 AM Federal Program Coordinator Zofia Swiatek There is no upload feature for this component, but a plan is available in the FRCPP, as well as by request. I can email or share our plan at any time.
District Comments								
4/9/2021 8:31:40 AM Federal Program Coordinator Zofia Swiatek There is no upload feature for this component, but a plan is available in the FRCPP, as well as by request. I can email or share our plan at any time.								
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
If you have additional comments to make about this section, enter them here:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					

## Title II A: Program

### Requirements

The purpose of this title is to provide grants to State educational agencies and subgrants to local educational agencies to (1) increase student achievement consistent with the challenging State academic standards; (2) improve the quality and effectiveness of teachers, principals, and other school leaders; (3) increase the number of teachers, principals, and other school leaders who are effective in improving student academic achievement in schools; and (4) provide low-income and minority students greater access to effective teachers, principals, and other school leaders.

#### Section 2001

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments		
1. The LEA provides evidence that Title II activities are data driven and that if data indicates a need in higher poverty schools, priority is given to these school(s).	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Evidence of data used to indicate large class sizes or justification for the types of professional development activities offered.			
2. The LEA provides evidence of stakeholder engagement in the development of Title II activities (including transfer discussions) e.g. parents, community members, schools staff.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Dated agendas and sign-in sheets for meetings that took place <b>prior</b> to the writing of the grant	<table border="1"> <thead> <tr> <th>District Comments</th> </tr> </thead> <tbody> <tr> <td>4/9/2021 8:56:24 AM Federal Program Coordinator Zofia Swiatek Surveys were conducted as parent attendance at planning meetings was low. More parents responded to the survey. Questions 8-13 of the Parent Survey directly impacted our efforts for the 2019-20 Title II initiatives.</td> </tr> </tbody> </table>	District Comments	4/9/2021 8:56:24 AM Federal Program Coordinator Zofia Swiatek Surveys were conducted as parent attendance at planning meetings was low. More parents responded to the survey. Questions 8-13 of the Parent Survey directly impacted our efforts for the 2019-20 Title II initiatives.
District Comments							
4/9/2021 8:56:24 AM Federal Program Coordinator Zofia Swiatek Surveys were conducted as parent attendance at planning meetings was low. More parents responded to the survey. Questions 8-13 of the Parent Survey directly impacted our efforts for the 2019-20 Title II initiatives.							

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<p>3. All expenditures are supplemental in nature and do not supplant, or replace, activities the LEA is required to provide under state or local law, including board approved policy.</p> <ul style="list-style-type: none"> <li>• Detailed list of ESSA-authorized activities:</li> <li>• Teacher/principal evaluation.</li> <li>• Recruitment and retention.</li> <li>• Class size reduction.</li> <li>• PD tech integration, data usage, parent engagement, IEP, ELL, early learning, selecting and implementing assessments.</li> <li>• Identify trauma, mental illness, and intervention.</li> <li>• Safety, drug and alcohol abuse, chronic absenteeism.</li> <li>• Gifted learning.</li> <li>• Library programs.</li> <li>• Sex abuse.</li> <li>• STEM.</li> <li>• Improved staff working conditions (feedback).</li> <li>• Career/tech ed integration and work-based learning to prepare for workforce or post-secondary transition</li> <li>• Other uses that at meet the intent of Title IIA</li> </ul>	☑	☐	☐	<p>☑ Expenditure printouts indicating detailed Title II activities</p>	

Desk monitoring only:

- Upload data
- Upload meeting notices, agenda and sign-in sheets for any meetings at which stakeholders were involved in the planning of Title II activities.
- Upload list of CSR staff and their certifications or copies of teacher certificates (blackout social security numbers)

[Title II Program - Requirements - Evidence of data to indicate large class size - Requirement 1.pdf](#)  
[Title II Program - Requirements - Stakeholder Engagement in Title II Activities - Requirement 2 - Teacher PD Survey.pdf](#)  
[Title II Program - Requirements - Stakeholder Engagement in Title II Activities - Requirement 2 - Parent Survey.pdf](#)  
[Title II Program - Requirements - Expenditures - Requirement 3 \(2\).pdf](#)

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<ul style="list-style-type: none"> <li>Upload data reports/summaries</li> </ul>					
<p>If you have additional comments to make about this section, enter them here:</p>					

## Title IVA: Program

### Requirements

The Student Support and Academic Enrichment (SSAE) program is intended to: 1) provide all students with access to a well-rounded education, 2) improve school conditions for student learning, and 3) improve the use of technology to improve the academic achievement and digital literacy of all students. (ESEA section 4101)

Sec. 4101

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments				
1. The LEA involves stakeholders (teachers, principals, parents/family members, specialized instructional support, nonpublic school officials (consultation), community partners/members, employers and local government representatives) in the planning of the Title IV application and activities.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> <b>Dated</b> agendas and sign-in sheets for meetings that took place <b>prior</b> to writing the grant.					
2. If the LEA distributed funds to schools, it targeted schools that have the greatest needs; have the highest percentages or numbers of children low-income; are identified as CSI and TSI; or are identified as persistently dangerous. <b>Please note: the LEA does not need to provide copies of the Consolidated Application as evidence. The monitor will view prior to monitoring. By checking this as met you are ensuring compliance with this requirement.</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Consolidated application Selection of Schools ranking page	<table border="1"> <thead> <tr> <th>District Comments</th> </tr> </thead> <tbody> <tr> <td>2/14/2020 10:43:46 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School operates as one school, therefore, we do not distribute funds to schools.</td> </tr> <tr> <th>Monitor Comments</th> </tr> <tr> <td>4/26/2021 6:48:46 AM Monitor Adem Oksuz The LEA operates as one school and does not need to distribute funds with other schools.</td> </tr> </tbody> </table>	District Comments	2/14/2020 10:43:46 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School operates as one school, therefore, we do not distribute funds to schools.	Monitor Comments	4/26/2021 6:48:46 AM Monitor Adem Oksuz The LEA operates as one school and does not need to distribute funds with other schools.
District Comments									
2/14/2020 10:43:46 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School operates as one school, therefore, we do not distribute funds to schools.									
Monitor Comments									
4/26/2021 6:48:46 AM Monitor Adem Oksuz The LEA operates as one school and does not need to distribute funds with other schools.									



Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments		
<p>3. The LEA <b>continued to consult</b> with stakeholders to improve the activities it conducts and coordinates implementation with other related activities conducted in the community</p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p><input checked="" type="checkbox"/> <b>Dated</b> agendas and sign-in sheets</p>	<table border="1"> <thead> <tr> <th data-bbox="1457 128 2049 180" style="text-align: center;">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1457 180 2049 462"> <p>3/11/2020 12:21:37 PM Federal Program Coordinator Zofia Swiatek February 2020 Parent Panel served as a platform for continued consultation with stakeholders. Video is too big to download and upload into FedMonitor. I can pull it up during the audit, if needed.</p> </td> </tr> </tbody> </table>	District Comments	<p>3/11/2020 12:21:37 PM Federal Program Coordinator Zofia Swiatek February 2020 Parent Panel served as a platform for continued consultation with stakeholders. Video is too big to download and upload into FedMonitor. I can pull it up during the audit, if needed.</p>
District Comments							
<p>3/11/2020 12:21:37 PM Federal Program Coordinator Zofia Swiatek February 2020 Parent Panel served as a platform for continued consultation with stakeholders. Video is too big to download and upload into FedMonitor. I can pull it up during the audit, if needed.</p>							
<p>4. LEA has only budgeted for 15% of the amount budgeted in Effective Use of Technology for technology infrastructure (devices, equipment, and software applications to address readiness shortfalls, blended learning technology software and platforms, the purchase of digital instructional resources, initial professional development activities, and one-time information technology purchases).</p> <p><b>Please note: the LEA does not need to provide copies of the Consolidated Application as evidence. The monitor will view prior to monitoring. By checking this as met you are ensuring compliance with this requirement.</b></p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p><input checked="" type="checkbox"/> Consolidated application showing funds in the Effective Use of Technology expenditure section</p>			
<p>5. If LEA receives more than \$30,000, the activities supported by Title IV are aligned with the needs of the district/schools. (Evidence: Needs Assessment Data that is less than 3 years old)</p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p><input checked="" type="checkbox"/> <b>Dated</b> needs Assessment</p>	<table border="1"> <thead> <tr> <th data-bbox="1457 894 2049 946" style="text-align: center;">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1457 946 2049 1265"> <p>3/11/2020 12:25:50 PM Federal Program Coordinator Zofia Swiatek Annual Parent Program Quality Survey (last issued March 2019) and our School Improvement Needs Assessment conducted within the past three years assess school needs and shows alignment with grant expenditures.</p> </td> </tr> </tbody> </table>	District Comments	<p>3/11/2020 12:25:50 PM Federal Program Coordinator Zofia Swiatek Annual Parent Program Quality Survey (last issued March 2019) and our School Improvement Needs Assessment conducted within the past three years assess school needs and shows alignment with grant expenditures.</p>
District Comments							
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Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<p>6. If the LEA has received more than \$30,000 in Title IV funds, 20% has been budgeted for Well-Rounded Educational activities. <b>Please note: the LEA does not need to provide copies of the Consolidated Application as evidence. The monitor will view prior to monitoring. By checking this as met you are ensuring compliance with this requirement.</b></p>	☑	☐	☐	<p>☐ Consolidated application Well-Rounded narrative completed.</p> <p>☑ Consolidated application showing funds in the Well-Rounded expenditure section</p>	
<p>7. If the LEA has received more than \$30,000 in Title IV funds, 20% has been budgeted for Safe and Healthy activities. <b>Please note: the LEA does not need to provide copies of the Consolidated Application as evidence. The monitor will view prior to monitoring. By checking this as met you are ensuring compliance with this requirement.</b></p>	☑	☐	☐	<p>☐ Consolidated application Safe and Healthy narrative completed.</p> <p>☑ Consolidated application showing funds in the Safe and Healthy expenditure section</p>	
<p>8. If the LEA has received more than \$30,000 in Title IV funds, some funds are budgeted for Effective Use of Technology activities. <b>Please note: the LEA does not need to provide copies of the Consolidated Application as evidence. The monitor will view prior to monitoring. By checking this as met you are ensuring compliance with this requirement.</b></p>	☑	☐	☐	<p>☐ Consolidated application Effective Use of Technology narrative completed.</p> <p>☑ Consolidated application showing funds in the Effective Use of Technology expenditure section</p>	

Desk monitoring only:

- Upload meeting notices, agenda and sign-in sheets for any meetings at which stakeholders were involved in the planning of Title IV activities.
- For those LEAs that receive more than \$30,000, upload Needs Assessment with date

[Title IV Program - Requirements - Continuation of Consultation with Parents - Parent Panel Schedule and Questions - Requirement 3.pdf](#)  
[Title IV Program - Requirements - Continued Consultation with Stakeholders - Sign-In Sheet - Requirement 3.pdf](#)  
[Title IV Program - Requirements - Stakeholders Needs Assessment - SIP Committee - Parents and Staff - Requirement 5.pdf](#)  
[Title IV Program - Requirements - Stakeholders Needs Assessment - SIP Student Focus Group - Requirement 5.pdf](#)  
[Title IV Program - Requirements - Stakeholder Involvement in Planning Title IV Activities - Guidance Survey - Requirement 1.pdf](#)

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<a href="#">Title IV Program - Requirements - Stakeholders Involvement in Planning Title IV Activities - Chronic Absenteeism - Requirement 1.pdf</a>					
<p>If you have additional comments to make about this section, enter them here:</p>					

## Personnel Interviews

Building	Date	Staff Member Interviewed	Staff Member Position
Pennsylvania Leadership Charter School	4/26/2021	Zofia Swiatek	Federal Programs Coordinator

**Division of Federal Program  
 Consolidated Program Review  
 2019-2020 School Year  
 Pennsylvania Leadership Charter School  
 Pennsylvania Leadership Charter School**

**SCHOOL Level Monitoring**

	<b>Name</b>	<b>Check if Interviewed</b>
Principal:	Mark Allen, Director of Academics	<input type="checkbox"/>
Parent:	Michael Logue, HS Principal	<input type="checkbox"/>
Parent:	Dr. Angela Hoover, Elem. Principal	<input type="checkbox"/>
Parent:	Kyana Brathwaite, parent	<input type="checkbox"/>
Parent:	_____	<input type="checkbox"/>
Parent:	_____	<input type="checkbox"/>

Program Reviewers: Adam Kenz                      Visit Date: 4/26/2021

## School Level Monitoring

### Component I: Appropriately State Certified

The Local Education Agency (LEA) and the Title I School has professional standards for paraprofessionals working in a program supported with Title I.

Sec. 1112(c)(6) Sec. 1112(e)(1)(A)

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
1. <b>All</b> instructional paraprofessionals working in a Title I program are appropriately certified.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> List of paraprofessionals working in the school & their qualifications: HS Diploma plus 2 years of college (48 credits), AA Degree or local assessment	<p style="text-align: center;"><b>District Comments</b></p> <p>2/14/2020 1:34:15 PM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not employ para-professionals.</p> <p style="text-align: center;"><b>Monitor Comments</b></p> <p>4/26/2021 6:50:15 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School does not employ para-professionals.</p>
2. Parents (in Title I schools only) are directly notified annually that they may request information regarding the professional qualifications of their child's teacher(s), and of paraprofessionals who provide instructional services to their children.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Copy of Right-to-Know - Teacher Qualifications letter <b>dated</b> and evidence of distribution date	
3. Parents (in Title I schools only) are notified if their child is assigned to or being taught for four or more consecutive weeks by a teacher who is not appropriately state certified. (This cannot be marked N/A.)	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/> Copy of Right-to-Know - Four Consecutive Week letter  <input type="checkbox"/> Evidence of distribution date with signature, if applicable	
<p>Desk Monitoring Only:</p> <ul style="list-style-type: none"> <li>Upload list of paraprofessionals working in Title I programs with their qualifications.</li> </ul>					
<p style="text-align: right;"> <a href="#">School Level Monitoring Program - Component 1 - Requirement 2 - Parent Right To Know Letter.pdf</a>  <a href="#">School Level Monitoring Program - Component I - Requirement 2 - Evidence of Distribution of RTK Letter (1).jpg</a> </p>					

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<ul style="list-style-type: none"> <li>• Upload dated copy of Right-to-Know Teacher Qualification letter</li> <li>• Upload a copy of Right-to-Know Four Consecutive Week letter</li> </ul>				<a href="#">School Level Monitoring Program - Component I - Requirement 3 - 4 Week Letter.pdf</a>	
<p>If you have additional comments to make about this section, enter them here:</p>					

## Component II: Parent and Family Engagement

The LEA may receive funds under this part only if such agency conducts outreach to all parents and family members and implements programs, activities, and procedures for the involvement of parents and family members in programs. Such programs, activities, and procedures shall be planned and implemented with meaningful consultation with parents of Title I students.

Sec. 1116

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments			
<p>1. Schools receiving Title I funds shall jointly develop with, and distribute to, Title I parents and family members a written parent and family engagement policy. Parents shall be notified of the policy in an understandable and uniform format and to the extent practicable in a language the parents can understand. The policy shall be made available to the local community and updated periodically to meet the changing needs of parents and the school.</p> <p><b>All the following are Required components:</b></p> <ul style="list-style-type: none"> <li>• Convene an annual meeting at a convenient time, to which all Title I parents shall be invited and encouraged to attend, to inform parents of their school's Title I program and to explain the requirements of Title I and the right of parents to be involved.</li> <li>• Offer a flexible number of meetings, such as meetings in the morning or evening, and may provide, with Title I funds, transportation, child care, or home visits, as such services relate to parental involvement</li> <li>• Involve parents, in an organized ongoing, and timely way, in the planning, review, and improvement of the Title I program, including the planning, review, and improvement of the school parent and family engagement policy and the joint development of the schoolwide program plan, if applicable, except that is a school has a process in place in process for involving parents in the joint planning and design of the school's programs, the school may use the process, if such process included an adequate representation of Title I.</li> <li>• Provide Title I parents               <ul style="list-style-type: none"> <li>◦ Timely information about Title I programs</li> </ul> </li> </ul>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p><input checked="" type="checkbox"/> School Parent and Family Engagement policy, (that includes all required components), with review/revision date, dated parent meeting, dated agenda &amp; sign-in sheets, and method of distribution</p>	<table border="1" style="width: 100%;"> <thead> <tr> <th data-bbox="1516 417 2043 467" style="text-align: center;">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1516 467 2043 748"> <p>3/11/2020 12:41:01 PM Federal Program Coordinator Zofia Swiatek Student and parent stakeholder review and revision opportunities were conducted over the course of the current school year.</p> </td> </tr> <tr> <td data-bbox="1516 748 2043 1164"> <p>4/11/2021 9:53:15 AM Federal Program Coordinator Zofia Swiatek The F&amp;PE Policy is distributed in several ways: as part of our Student-Parent Handbook, on our school's internal facing website, and through our enrollment packet/continuing student information packet. I can provide access to these internal processes on the day of the audit.</p> </td> </tr> </tbody> </table>	District Comments	<p>3/11/2020 12:41:01 PM Federal Program Coordinator Zofia Swiatek Student and parent stakeholder review and revision opportunities were conducted over the course of the current school year.</p>	<p>4/11/2021 9:53:15 AM Federal Program Coordinator Zofia Swiatek The F&amp;PE Policy is distributed in several ways: as part of our Student-Parent Handbook, on our school's internal facing website, and through our enrollment packet/continuing student information packet. I can provide access to these internal processes on the day of the audit.</p>
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Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<ul style="list-style-type: none"> <li>○ A description and explanation of the curriculum in use at the school, the forms of academic assessment used to measure student progress, and the achievement levels of the challenging State academic standards</li> <li>○ If requested by parents, opportunities for regular meetings to formulate suggestions and to participate, as appropriate, in decisions relating to the education of their children, and respond to any suggestions as soon as practicably possible.</li> <li>○ If the schoolwide plan is not satisfactory to Title I parents, submit any parent comments on the plan when the school makes the plan available to the LEA. (Only applies to Schoolwide schools).</li> <li>○ Shall educate teachers, specialized instructional support personnel, and other staff, with the assistance of parents, in the value and utility of contributions of parents and family members, and in how to reach out to, communicate with, and work with parents and family members as equal partners, implement and coordinate parent programs, and build ties between parents and family members and the school.</li> <li>○ Describes how the school will aid parents in understanding the State's academic content standards and student achievement standards, local academic assessments and how to monitor a child's progress and work with teachers to improve the achievement of their children.</li> <li>○ States that a school-parent compact was jointly developed with parents and the compact outlines how parents, the entire school staff and students will share in the responsibility for improved student achievement.</li> </ul>					

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<ul style="list-style-type: none"> <li>○ Describes how the school provides materials and training to help parents to work with their children to improve their children's achievement, such as literacy training and using technology, as appropriate, to foster parent involvement.</li> <li>○ States how the school will, to the extent feasible and appropriate, coordinate, and integrate parent involvement programs and activities with other Federal, State, and local programs including public preschool programs and conduct other activities, that encourage and support parents and family members in more fully participating in the education of their children.</li> <li>○ States how the school will ensure that information related to school and parent programs, meetings, and other activities is sent to the parents and family members of participating children in a format and to the extent practicable, in a language the parents and family members can understand.</li> <li>○ States how the school, to the extent practicable, will provide opportunities for the informed participation of parents and family members (including parents and family members who have limited English proficiency, parents and family members with disabilities, and parents and family members of migratory children).</li> </ul>					

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments		
<p>2. Convene an annual meeting at a convenient time, to which all Title I parents shall be invited and encouraged to attend, to inform parents of their school's Title I program and to explain the requirements of Title I and the right of parents to be involved.</p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> <b>Dated</b> Title I meeting agenda & sign-in sheets	<table border="1"> <thead> <tr> <th data-bbox="1514 128 2055 180">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1514 180 2055 532"> <p>3/11/2020 12:43:25 PM Federal Program Coordinator Zofia Swiatek Annual Fall Title Meetings were held for all parents 7PM November 1, 2019 and a morning session Monday, November 4, 2019. Recordings can be viewed by clicking the link in the Smore newsletter.</p> </td> </tr> </tbody> </table>	District Comments	<p>3/11/2020 12:43:25 PM Federal Program Coordinator Zofia Swiatek Annual Fall Title Meetings were held for all parents 7PM November 1, 2019 and a morning session Monday, November 4, 2019. Recordings can be viewed by clicking the link in the Smore newsletter.</p>
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Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<p>3. Each Title I school shall jointly develop with parents of Title I children a school parent compact that outlines how parents, the entire school staff, and students will share the responsibility for improved student academic achievement and the school and parents will build and develop a partnership to help children achieve the State's high standards. The compact shall</p> <ul style="list-style-type: none"> <li>• describe the school's responsibility to provide high-quality curriculum and instruction in a supportive and effective learning environment that enables Title I children to meet the State academic standards, and the ways in which each parent will be responsible for supporting their children's learning; volunteering in their child's classroom, and participating as appropriate, in decisions relating to the education of their children and positive use of extracurricular time, and</li> <li>• address the importance of communication between teachers and parents on an ongoing basis through at a minimum: parent-teacher conferences in elementary schools, at least annually, during which the compact shall be discussed as the compact relates to the individual child's achievement; frequent reports to parents on their children's progress; reasonable access to staff, opportunities to volunteer and participate in their child's class, and observation of classroom activities; and ensuring two-way meaningful communication between family members and school staff, and to the extent practicable, in a language that family members can understand.</li> </ul>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> School-parent compact with review/revision date, dated agenda, sign-in sheets and method of distribution	

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
4. Title I Schools shall aid parents of Title I children in understanding such topics as the challenging State academic standards, State and local academic assessments, and how to monitor a child's progress and work with educators to improve the achievement of their children.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> <b>Dated</b> Title I meeting agenda & sign-in sheets that indicate topics of discussion  <input type="checkbox"/> Staff/Parent meeting agendas and sign-in sheets	<div style="background-color: #cccccc; text-align: center; padding: 2px;"><b>District Comments</b></div> 3/11/2020 12:59:57 PM Federal Program Coordinator Zofia Swiatek School-wide Parent data-driven webinar/meeting informed parents of standards and assessments to improve achievement.
5. Title I Schools shall provide materials and training to help parents to work with their children to improve their childrens achievement, such as literacy training and using technology (including education about the harms of copyright piracy) as appropriate, to foster parent involvement.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Training materials, evaluations, agendas & sign-in sheets, calendar of events  <input checked="" type="checkbox"/> Workshops with copies of dated agendas and sign-in sheets.	<div style="background-color: #cccccc; text-align: center; padding: 2px;"><b>District Comments</b></div> 4/15/2020 9:57:00 AM Federal Program Coordinator Zofia Swiatek These were done virtually through webinars offered over the course of the year. Webinar schedule is included as documentation for this requirement. Links and recordings can be pulled up on the day of the audit.
6. <b>ALL</b> schools teachers and staff shall <b>annually</b> be educated, with the assistance of parents, in how to better communicate with, or work with, parents as equal partners.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> <b>Dated</b> staff meeting agendas and sign-in sheets  <input type="checkbox"/> SPAC skits and staff agendas and sign in sheets  <input type="checkbox"/> Dated staff meeting agenda and sign-in sheets utilizing parent survey results (open-ended questions included)	

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments		
7. Title I Schools shall coordinate and integrate parent involvement programs and activities with other Federal, State, and local programs, including public preschool programs.	☑	☐	☐	<input type="checkbox"/> Transition Plan <input checked="" type="checkbox"/> Parent training materials, evaluations, agendas, calendar of events <input type="checkbox"/> Staff/Parent meeting agendas and sign-in sheets	<table border="1"> <thead> <tr> <th data-bbox="1507 123 2053 180" style="text-align: center;">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1507 180 2053 467">           4/15/2020 10:13:08 AM            Federal Program Coordinator Zofia Swiatek            We work alongside NAFSCE, the Family Involvement Conference team, and with SPAC to strengthen our parent involvement programs.         </td> </tr> </tbody> </table>	District Comments	4/15/2020 10:13:08 AM Federal Program Coordinator Zofia Swiatek We work alongside NAFSCE, the Family Involvement Conference team, and with SPAC to strengthen our parent involvement programs.
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8. Title I schools shall ensure that information related to school and parent programs, meetings, and other activities is sent to Title I parents in a format and, the extent practicable, in a language the parents can understand.	☑	☐	☐	<input checked="" type="checkbox"/> Translated documents such as fliers, letters, web site postings <input type="checkbox"/> Translated Schoolwide Plan			
<b>Desk Monitoring Only:</b> <ul style="list-style-type: none"> <li>• Upload School-Level Parent and Family Engagement Policy for each Title I school, parent meeting agenda and sign in sheet, and method of distribution.</li> <li>• Upload agenda for annual Title I meeting and sign-in sheets.</li> <li>• Upload School-Parent Compact for each Title I school and agenda and sign in sheet from parent meeting.</li> <li>• Upload Staff/Parent meeting agendas, back-to-school nights or parent training meetings.</li> <li>• Upload Staff/Parent meeting agendas, back-to-school nights or parent training meetings.</li> <li>• Upload agenda of staff meeting(s) where discussion of effective means to communicate with parents is discussed, along with sign-in sheets. Include documentation of parent involvement in the process.</li> <li>• Upload a sample translated document.</li> </ul>				<a href="#">School Level Monitoring Program - Component 2 - Requirement 1 - Parent and Family Engagement Policy.pdf</a> <a href="#">School Level Monitoring Program - Component 2 - Requirement 1 - Parent and Family Engagement Policy Review Meeting Attendance.pdf</a> <a href="#">School Level Monitoring Program - Component 2 - Requirement 2 - Annual Title I Meeting Notification.pdf</a> <a href="#">School Level Monitoring Program - Component 2 - Requirement 6 - Parents Educating Staff on how to Communicate with Families.pdf</a> <a href="#">School Level Monitoring Program - Component 2 - Requirement 8 - Translated Student Education Record Privacy Notification.pdf</a> <a href="#">School Level Monitoring Program - Component 2 - Requirement 8 - Translated Annual Parent Right To Request Teacher Qualifications.pdf</a> <a href="#">School Level Monitoring Program - Component 2 - Requirement 8 - Translated Annual Notice to Parents.pdf</a> <a href="#">School Level Monitoring Program - Component 2- Requirement 7 - Integration of Parent Workshops and Programs in School Activities.pdf</a> <a href="#">School Level Monitoring Program - Component 2 - Requirements 4 and 5 - Parent Webinar Series Links, Agendas, and Recordings.pdf</a>			

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
If you have additional comments to make about this section, enter them here:					

### Component III: Schoolwide Programs

An eligible school operating a schoolwide program shall develop a comprehensive plan (or amend a plan for such a program that was in existence on the day before the date of the enactment of the Every Student Succeeds Act)

Sec. 1114

If the school does not operate a Schoolwide Program, this section can be skipped.

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments		
<p>1. Have a completed/revised Schoolwide Plan. Plan is based on a comprehensive needs assessment of the entire school that takes into account information on the academic achievement of children in relation to the challenging State academic standards, particularly the needs of those children who are failing, or are at-risk of failing, to meet the challenging State academic standards and any other factors as determined by the local educational agency; and includes a description of the strategies that the school will be implementing to address school needs, including a description of how such strategies will provide opportunities for all children, including each of the subgroups of students (as defined in section 1111(c)(2)) to meet the challenging State academic standards; use methods and instructional strategies that strengthen the academic program in the school, increase the amount and quality of learning time, and help provide an enriched and accelerated curriculum, which may include programs, activities, and courses necessary to provide a well-rounded education; and address the needs of all children in the school, but particularly the needs of those at risk of not meeting the challenging State academic standards.</p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Copy of the School Plan Template OR the Schoolwide Plan Must also provide agendas and sign-in sheets, demonstrating plan was updated within a year of the monitoring visit.	<table border="1" style="width: 100%;"> <thead> <tr> <th data-bbox="1671 472 2045 521">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1671 521 2045 870">           4/11/2021 9:51:38 AM            Federal Program            Coordinator Zofia Swiatek            I tried to upload our A-TSI School Improvement Plan, but the file itself was too big for FedMonitor. I can pull it up the day of the audit.         </td> </tr> </tbody> </table>	District Comments	4/11/2021 9:51:38 AM Federal Program Coordinator Zofia Swiatek I tried to upload our A-TSI School Improvement Plan, but the file itself was too big for FedMonitor. I can pull it up the day of the audit.
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<p>Desk Monitoring Only: Upload a copy of the School Plan Template or the Schoolwide Plan and sign-in sheets and agendas demonstrating plan was updated within a year of the monitoring visit.</p>	<p style="text-align: right;"> <a href="#">School Level Monitoring Program - Component 3 - Requirement 1 - School-wide Plan Meetings for 2019-2020 School Year with Attached Plan.pdf</a>  <a href="#">School Level Monitoring Program - Component 3 - Requirement 1 - School-wide SIP Focus Group Data.docx</a> </p>						
<p><b>Note: If the school does not have an approved Schoolwide Plan, must monitor requirements in the Targeted Assistance section.</b></p>							
<p>If you have additional comments to make about this section, enter them here:</p>							



## Component IV: Targeted Assistance Programs

In all schools selected to receive funds under section 1113(c) that are ineligible for a schoolwide program under section 1114, have not received a waiver under section 1114(a)(1)(B) to operate such a schoolwide program, or choose not to operate such a schoolwide program, a local educational agency serving such school may use funds received under this part only for programs that provide services to eligible children under subsection (c) identified as having the greatest need for special assistance.

Sec. 1113

If the school does not operate a Targeted Assistance Program, this section can be skipped.

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
1. The Title I school determines which students will be served, and serves participating students identified as eligible.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Selection criteria and student roster with test scores that includes rank order listing.	
2. The Title I school uses resources under this part to help eligible children meet the challenging State academic standards, which may include programs, activities, and academic courses necessary to provide a well-rounded education.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> List of programs, activities, and academic courses provided to eligible children	
3. The Title I school uses methods and instructional strategies to strengthen the academic program of the school through activities, which may include expanded learning time, before- and after-school, and summer programs and opportunities; and a schoolwide tiered model to prevent and address behavior problems, and early intervening services, coordinated with similar activities and services carried out under the Individuals with Disabilities Education Act (20 U.S.C. 1400 et seq.).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> List of instructional strategies including activities that strengthen the academic program provided to eligible children	
4. The Title I school coordinates with and supports the regular education program, which may include services to assist preschool children in the transition from early childhood education programs such as Head Start, the literacy program under subpart 2 of part B of title II, or State-run preschool programs to elementary school programs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Documentation of regular team meetings, <b>dated</b> agenda, sign-in sheets, and minutes	
5. The Title I school provides professional development with resources provided under this part, and, to the extent practicable, from other sources, to teachers, principals, other school leaders, paraprofessionals, and, if appropriate, specialized instructional support personnel, and other school personnel who work with eligible children in programs under this section or in the regular education program.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> List of professional development activities, <b>dated</b> agendas, and sign in sheets	
Desk Monitoring Only:					

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<ul style="list-style-type: none"> <li>• Upload selection criteria and student roster with test scores that includes rank order listing</li> <li>• Upload a list of instructional strategies including activities that strengthen the academic program provided to eligible children</li> <li>• Upload a list of professional development activities, agendas, and sign in sheets</li> </ul>					
<p style="text-align: center;">If you have additional comments to make about this section, enter them here:</p>					

COMMONWEALTH OF PENNSYLVANIA  
DEPARTMENT OF EDUCATION  
333 Market Street Harrisburg, PA 17126-0333

Division of Federal Programs  
Consolidated Program Review

2019-2020 School Year

Pennsylvania Leadership Charter School  
1332 Enterprise Dr.  
West Chester, PA 19380

LEA Level Monitoring

	<u>Name</u>	<u>Phone Number</u>	Check if Interviewed
<b>Superintendent:</b>	James Hanak	610-701-3333	<input type="checkbox"/>
<b>Business Manager:</b>	Roger Masch	512-481-9777	<input checked="" type="checkbox"/>
<b>Federal Program Coordinator:</b>	Zofia V Swiatek	61070133331108	<input checked="" type="checkbox"/>
<b>Parent/Family Member:</b>			<input type="checkbox"/>

**Program(s) Reviewed:**

- Title IA: Fiscal
- Title IIA: Fiscal
- Title IIIA: Fiscal
- Title IVA: Fiscal

**Program Reviewer(s):** Adam Kenz

**Program Review Date:** 04/26/2021

# Title IA: Fiscal

## Component I: General Fiscal Requirements/Uniform Grants Guidance

Fiscal monitoring is different than program monitoring: Fiscal monitoring will include a review of a subgrantee's financial operations, which may include a review of internal controls for program funds in accordance with state and federal requirements, an examination of principles, laws and regulations, and a determination of whether costs are reasonable and necessary to achieve program objectives. This activity involves an assessment of financial statements, records, and procedures. It is similar to an audit but has a lesser degree of detail and depth and, usually, a higher degree of frequency.

Fiscal monitoring includes, but is not limited to:

- Reviewing a random sample (usually 3-5 per program) of invoices or bills for expenditures charged to the program to determine if appropriate units of measure are reported and that costs (units x rate) are correct and that costs align with grant objectives and were approved in the application for funds.
- Comparing budgets or budget limits to actual costs to determine if the LEAs expenditures are likely to be more or less than budgeted
- Obtaining documentation that services billed or items purchased were actually delivered according to the contract
- Comparing invoices with supporting documentation to determine that costs were allowable, necessary, and allocable.

An expenditure is allowable if it is an approved use of funds under the statute or regulations governing a program and meet the intent of the program.

An expenditure is necessary if it is part of an approved application for funding.

An expenditure is allocable to the extent that the expenditure is used to meet the intent of the grant program (costs are pro-rated across grants if used to meet several grant program objectives).

Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
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Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<p>1. Audits</p> <p>The SEA ensures that LEAs are audited annually, if required, and that all corrective actions identified through this process are fully implemented.  <b>NOTE: The most recent federal audit corrective actions may not be fully implemented if the audit was just completed in the last few months.</b></p> <p>Uniform Grants Guidance  Section 200.501</p>	<p>1. Copies of single audit reports (2 most recent), corrective action plans and approval documents for the LEA</p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Two most recent audit reports (federal programs only, sections tabbed and marked)  <input type="checkbox"/> LEA response to findings  <input type="checkbox"/> PDE follow-up review of findings  <input type="checkbox"/> Independent auditor report shows that LEA has completed all corrective actions	
<p>2. Equipment and Related Property</p> <p>UGG Sec. 200.313</p>	<p>1. LEA maintains Inventory records, purchase orders and receipts for equipment (over \$5,000) purchased and Computing Devices and Special Purpose Equipment (\$300 - \$4,999)</p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Inventory list of items purchased with Title I A.	

Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments				
	2. LEA conducts a physical inventory of all items every two years	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Documentation that physical inventory was conducted within the last two years	<table border="1"> <thead> <tr> <th data-bbox="1663 128 2055 180">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1663 180 2055 500">4/9/2021 1:13:08 PM Federal Program Coordinator Zofia Swiatek 2019-20 was the first year that inventory record keeping is required, based on unit cost and type of equipment.</td> </tr> <tr> <th data-bbox="1663 500 2055 552">Monitor Comments</th> </tr> <tr> <td data-bbox="1663 552 2055 828">4/26/2021 6:52:20 AM Monitor Adem Oksuz The LEA states 2019-20 was the first year that inventory record keeping is required, based on unit cost and type of equipment.</td> </tr> </tbody> </table>	District Comments	4/9/2021 1:13:08 PM Federal Program Coordinator Zofia Swiatek 2019-20 was the first year that inventory record keeping is required, based on unit cost and type of equipment.	Monitor Comments	4/26/2021 6:52:20 AM Monitor Adem Oksuz The LEA states 2019-20 was the first year that inventory record keeping is required, based on unit cost and type of equipment.
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Monitor Comments										
4/26/2021 6:52:20 AM Monitor Adem Oksuz The LEA states 2019-20 was the first year that inventory record keeping is required, based on unit cost and type of equipment.										
3. Obligating Funds UGG Sec. 200.309	1. LEA began obligating funds on or after the programs' approved/submit date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> List approval/submit date in comment section  <input checked="" type="checkbox"/> Documentation that program funds were not spent prior to program approval/submit date	<table border="1"> <thead> <tr> <th data-bbox="1663 837 2055 889">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1663 889 2055 1205">4/9/2021 12:41:06 PM Federal Program Coordinator Zofia Swiatek Expenditures for Title I is linked here, but a closer look can be offered day of the audit by reviewing the 2019-20 Title Grant workbook.</td> </tr> </tbody> </table>	District Comments	4/9/2021 12:41:06 PM Federal Program Coordinator Zofia Swiatek Expenditures for Title I is linked here, but a closer look can be offered day of the audit by reviewing the 2019-20 Title Grant workbook.		
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Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments		
4. Record Retention UGG Sec. 200.333	1. Federal program records are maintained for a period of 7 years (current year plus 6 prior)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Evidence that records are maintained for a period of seven years	<table border="1"> <thead> <tr> <th data-bbox="1661 128 2055 180">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1661 180 2055 535">           4/9/2021 1:19:42 PM            Federal Program Coordinator Zofia Swiatek            Physical files are kept on-site in a locked closet. 2013-2014 Title binder is there. I will pick up the binder the Friday before to show it during audit day.         </td> </tr> </tbody> </table>	District Comments	4/9/2021 1:19:42 PM Federal Program Coordinator Zofia Swiatek Physical files are kept on-site in a locked closet. 2013-2014 Title binder is there. I will pick up the binder the Friday before to show it during audit day.
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4/9/2021 1:19:42 PM Federal Program Coordinator Zofia Swiatek Physical files are kept on-site in a locked closet. 2013-2014 Title binder is there. I will pick up the binder the Friday before to show it during audit day.								
5. Performance Goal Reporting Verification UGG 200.328	1. LEA has submitted the Performance Goal Output Report, for the prior year, for Title IA. <b>Please note: the LEA does not need to provide copies of the Consolidated Application. The monitor will view prior to monitoring. By checking this as met you are ensuring compliance with this requirement.</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Consolidated Application, Performance Goal Output Report in Title IA			
	2. Backup documentation exists for the performance goal report that aligns with the data indicated in the goals that would be used to determine success.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Data reports/summaries must be present at time of monitoring.			

Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<p>6. Conflict of Interest Policy</p> <p>UGG Sec 200.112</p>	<p>1. Conflict of Interest Requirement the non-federal entity must disclose in writing any potential conflict of interest to the Federal awarding agency or pass-through entity in accordance with the applicable Federal awarding agency policy, which includes:</p> <ul style="list-style-type: none"> <li>• Standards of Conduct (covering conflicts of interest when governing the actions of its employees engaged in the selection award and administration of contracts)</li> <li>• Organizational Conflicts- (relationships with a parent company, affiliate, or subsidiary organization, the non-Federal entity is unable or appears to be unable to be impartial in conducting a procurement action involving a related organization)</li> <li>• Disciplinary Actions- (actions taken against an individual who violates the standards of conduct)</li> <li>• Mandatory Disclosure- (potential conflict disclosed in writing)</li> </ul>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Board Approved policy, <input type="checkbox"/> Self-disclosure form,  <input type="checkbox"/> Resolution form or other evidence of how it was resolved (waived, or disciplinary actions taken)	
<p>7. Allowability of Costs</p> <p>UGG Sec 200.43</p>	<p>1. Allowability of Costs Requirement Expenditures must be aligned with approved budgeted items and when determining how the District expends its funds the procedures must include the following cost principles:</p> <ul style="list-style-type: none"> <li>• Necessary, reasonable and allocable</li> <li>• Conform with federal law and grant terms</li> <li>• Consistent with state and local policies</li> <li>• Adequately documented</li> </ul>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Review program expenditures <input type="checkbox"/> Review Allowability of Costs Procedures to check for internal controls relating to bulleted items.	



Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<p>8. Procurement</p> <p>UGG Sec 200.320, 100.67, 200.88</p>	<p>1. Procurement the LEA maintains purchasing procedures</p> <p>Micro-purchases (purchase up to \$10,000)</p> <ul style="list-style-type: none"> <li>• Small Purchase (between \$10,000-\$250,000)</li> <li>• Sealed Bids (purchases over \$250,000 with formal advertising)</li> <li>• Competitive Proposals (more than one source submitting a proposal)</li> <li>• Non-competitive Proposals i.e. Sole Source (Solicitation of a proposal from only one source)</li> </ul>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p><input checked="" type="checkbox"/> Procurement procedures exist and include the specific procedures to be followed internally for the five procurement levels</p> <p><input type="checkbox"/> Evidence that procurement procedures were followed for 3-5 tested random expenditures.</p>	
<p>9. Cash Management Procedures</p> <p>UGG Sec 200.305</p>	<p>1. Cash Management - the LEA must maintain written procedures to implement the following cash management requirements:</p> <ul style="list-style-type: none"> <li>• Reimbursements - explain what happens if the LEA is initially charging federal grant expenditures to nonfederal funds</li> <li>• Advances - explain what happens if the LEA receives advance payments of federal grant funds</li> <li>• Interest - explain how the LEA will manage interest earned on federal grant awards</li> </ul>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p><input checked="" type="checkbox"/> Procedures are available that address the three components</p> <p><input type="checkbox"/> Evidence that LEA returned interest earned in excess of \$500 to federal government, if applicable</p>	

Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments				
<p>10. Travel Reimbursement</p> <p>UGG Sec 200.474</p>	<p>1. Travel the LEA must have written travel policies for travel costs to be allowable</p> <ul style="list-style-type: none"> <li>• Types of travel (single day, overnight or out-of-state)</li> <li>• What expenses may be reimbursed (food, lodging, transportation, airfare)</li> <li>• What type of documentation is needed for reimbursement? (pre-approval travel form, receipts, post travel form)</li> </ul>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Board approved policies available for review</li> <li><input type="checkbox"/> Samples of travel requests reviewed followed policy</li> <li><input type="checkbox"/> Prior written approval was obtained by PDE for out of state travel</li> </ul>					
<p>11. Prior Written Approval for Various Expenditures</p> <p>UGG Sec 200.413, 200.474, 200.438, 200.439, 200.454</p>	<p>1. LEA must obtain prior written approval for the following expenditures:</p> <ul style="list-style-type: none"> <li>• Salaries of Administrative Staff (Clerical and Federal Program Coordinators) (200.413(c))</li> <li>• Out of State Travel for workshops/conferences (200.474)</li> <li>• Entertainment Costs (200.438)</li> <li>• Equipment (200.439)</li> <li>• Student Activity Costs</li> <li>• Memberships, subscriptions, and Professional Activities (200.454)</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Items were included in approved consolidated application budgets and/or narratives</li> <li><input type="checkbox"/> Emails or other correspondence with regional coordinator requesting and receiving approval for expenditures.</li> </ul>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th data-bbox="1663 553 2055 610" style="background-color: #cccccc;">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1663 610 2055 954"> <p>2/14/2020 10:58:50 AM</p> <p>Federal Program Coordinator Zofia Swiatek</p> <p>Pennsylvania Leadership Charter School has not written in these expenditures into the grant and will not be using Title IA funding for this purpose.</p> </td> </tr> <tr> <th data-bbox="1663 954 2055 1011" style="background-color: #cccccc;">Monitor Comments</th> </tr> <tr> <td data-bbox="1663 1011 2055 1317"> <p>4/26/2021 6:54:16 AM</p> <p>Monitor Adem Oksuz</p> <p>Pennsylvania Leadership Charter School has not written these expenditures into the grant and will not be using Title IA funding for this purpose.</p> </td> </tr> </tbody> </table>	District Comments	<p>2/14/2020 10:58:50 AM</p> <p>Federal Program Coordinator Zofia Swiatek</p> <p>Pennsylvania Leadership Charter School has not written in these expenditures into the grant and will not be using Title IA funding for this purpose.</p>	Monitor Comments	<p>4/26/2021 6:54:16 AM</p> <p>Monitor Adem Oksuz</p> <p>Pennsylvania Leadership Charter School has not written these expenditures into the grant and will not be using Title IA funding for this purpose.</p>
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<p>12. Carryover</p> <p>The LEA complies with the carryover provisions of Title I.</p> <p>Sec. 1127</p>	<p>1. LEAs with Title I allocations greater than \$50,000 per year have not carried over more than 15% of their allocation from one year to next unless the SEA has waived the limitation (allowable once every 3-year cycle if the SEA believes the request is reasonable and necessary</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<p><input type="checkbox"/> Consolidated Application Carryover section</p> <p><input type="checkbox"/> Waiver request and Carryover Waiver Approval Letter</p>	<p style="text-align: center;"><b>District Comments</b></p> <p>2/14/2020 10:59:47 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School has not carried over funding to date.</p> <p style="text-align: center;"><b>Monitor Comments</b></p> <p>4/26/2021 6:54:29 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School has not carried over funding to date.</p>
<p>13. Rank Order</p> <p>The LEA ensures that it complies with the requirements of Title I when allocating funds to eligible school attendance areas or schools in rank order of poverty based on the number of children from low-income families who reside in an eligible school attendance area.</p> <p>Sec. 1113</p>	<p>1. The LEA must rank buildings highest to lowest based on poverty percentages. All buildings over 75% low-income must be served, regardless of grade span, in rank order. Buildings below 75% can be served in rank order in two manners, either still in rank order regardless of grade span, or by rank order within grade span." This can be marked N/A only if one of the following applies; the LEA has one building per grade span, the LEA is a single building, less than 1,000 district enrollment, or a Charter School.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<p><input type="checkbox"/> Building Level Title I Expenditures</p>	<p style="text-align: center;"><b>District Comments</b></p> <p>2/14/2020 11:00:39 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School is one school and therefore does not rank.</p> <p style="text-align: center;"><b>Monitor Comments</b></p> <p>4/26/2021 6:54:39 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School is one school and therefore does not rank.</p>

Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments				
	<p>2. Buildings above 75% low-income must be served and can only not be served after written approval has been established by PDE. If an LEA has a building over 75%, this cannot be marked N/A. <b>Please note: the LEA does not need to provide copies of the Consolidated Application as evidence. The monitor will view prior to monitoring. By checking this as met you are ensuring compliance with this requirement.</b></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Consolidated Application, Selection of Schools</li> <li><input type="checkbox"/> Approval by Regional Coordinator and evidence of a supplemental program</li> </ul>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th data-bbox="1663 131 2055 180" style="background-color: #cccccc;">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1663 180 2055 423"> <p>2/14/2020 11:02:27 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School is one school and therefore does not rank.</p> </td> </tr> <tr> <th data-bbox="1663 423 2055 472" style="background-color: #cccccc;">Monitor Comments</th> </tr> <tr> <td data-bbox="1663 472 2055 683"> <p>4/26/2021 6:54:45 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School is one school and therefore does not rank.</p> </td> </tr> </tbody> </table>	District Comments	<p>2/14/2020 11:02:27 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School is one school and therefore does not rank.</p>	Monitor Comments	<p>4/26/2021 6:54:45 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School is one school and therefore does not rank.</p>
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	<p>3. Pre-kindergarten children are excluded from the poverty count of any school</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<ul style="list-style-type: none"> <li><input type="checkbox"/> PIMS Report on Economically Disadvantaged</li> <li><input type="checkbox"/> Other printed documentation showing Pre-K excluded from enrollment counts</li> </ul>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th data-bbox="1663 699 2055 748" style="background-color: #cccccc;">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1663 748 2055 992"> <p>2/14/2020 11:03:19 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School is one school and therefore does not rank.</p> </td> </tr> <tr> <th data-bbox="1663 992 2055 1040" style="background-color: #cccccc;">Monitor Comments</th> </tr> <tr> <td data-bbox="1663 1040 2055 1252"> <p>4/26/2021 6:54:52 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School is one school and therefore does not rank.</p> </td> </tr> </tbody> </table>	District Comments	<p>2/14/2020 11:03:19 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School is one school and therefore does not rank.</p>	Monitor Comments	<p>4/26/2021 6:54:52 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School is one school and therefore does not rank.</p>
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<p>14. Comparability</p> <p>The LEA complies with the comparability provisions of Title I</p> <p>Sec. 1118(c)</p>	<p>1. Title I Comparability Report comparing Title I schools to non-Title I schools reported to SEA annually in Pennsylvania and submitted by November 15 <b>Please note: the LEA does not need to provide evidence. Monitor will view prior to monitoring from the Comparability website. By checking this as met you are ensuring compliance with this requirement.</b></p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p><input type="checkbox"/> Detailed Data Sheet and Assurance page</p> <p><input checked="" type="checkbox"/> Assurance page for those LEAs that are exempt</p>	<p><b>District Comments</b></p> <p>2/14/2020 11:07:15 AM</p> <p>Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School is a charter school and is therefore exempt.</p> <p><b>Monitor Comments</b></p> <p>4/26/2021 9:59:12 AM</p> <p>Monitor Adem Oksuz Pennsylvania Leadership Charter School submitted Title I Comparability assurances.</p>
<p>15. Compliance to Reservations</p> <p>The LEA complies with requirements regarding the reservation of funds.</p> <p>Sec. 1113(c)(3), 42 U.S.C 11432</p> <p>Sec. 1116(a)(3)</p>	<p>1. The LEA has reserved funds for Homeless students at both Title I served and non-Title I served buildings. This is a district-level reservation. <b>Please note: the LEA does not need to provide copies of the Consolidated Application as evidence. The monitor will view prior to monitoring. By checking this as met you are ensuring compliance with this requirement.</b></p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p><input type="checkbox"/> Consolidated Application Reservation of Funds page</p> <p><input checked="" type="checkbox"/> Consolidated Application Title I budget</p> <p><input type="checkbox"/> Statement of expenditures for homeless</p>	

Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments				
	<p>2. LEAs receiving more than \$500,000 in Title I funds have reserved a minimum of 1% of the allocation for parent and family engagement and have distributed a minimum of 90% of those funds to the school level. A LEA may reserve more than 1% of the allocation. The 90% building-level allocation rule is only applicable against the original 1%, not any percentage above. <b>Please note: the LEA does not need to provide copies of the Consolidated Application as evidence. The monitor will view prior to monitoring. By checking this as met you are ensuring compliance with this requirement.</b></p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p><input checked="" type="checkbox"/> Consolidated Application, Reservation of Funds</p> <p><input type="checkbox"/> Procedure for allocation of at least 90% of Parent and Family Engagement funds to the school level must be demonstrated and applicable expenditures provided as evidence of compliance</p>					
	<p>3. LEA reserved appropriate funds for Neglected Institution served. (If not used, select NA)</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<p><input type="checkbox"/> Statement of expenditures for Neglected Institution</p>	<table border="1"> <thead> <tr> <th data-bbox="1663 615 2055 667">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1663 667 2055 946"> <p>2/14/2020 11:09:42 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not serve any neglected institutions.</p> </td> </tr> <tr> <th data-bbox="1663 946 2055 998">Monitor Comments</th> </tr> <tr> <td data-bbox="1663 998 2055 1240"> <p>4/26/2021 6:55:47 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School does not serve any neglected institutions.</p> </td> </tr> </tbody> </table>	District Comments	<p>2/14/2020 11:09:42 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not serve any neglected institutions.</p>	Monitor Comments	<p>4/26/2021 6:55:47 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School does not serve any neglected institutions.</p>
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	4. The LEA has reserved funds for Foster students at both Title I served and non-Title I served buildings. This is a district-level reservation. (LEAs are not required to set aside funds for Foster students. This can be marked N/A If not used).	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Statement of expenditures for Foster	<table border="1"> <thead> <tr> <th data-bbox="1663 128 2055 180">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1663 180 2055 461">2/14/2020 11:10:06 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School did not reserve funds for foster students.</td> </tr> <tr> <th data-bbox="1663 461 2055 513">Monitor Comments</th> </tr> <tr> <td data-bbox="1663 513 2055 756">4/26/2021 6:56:04 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School did not reserve funds for foster students.</td> </tr> </tbody> </table>	District Comments	2/14/2020 11:10:06 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School did not reserve funds for foster students.	Monitor Comments	4/26/2021 6:56:04 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School did not reserve funds for foster students.
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	5. If LEA has indicated the use of the Salary and Fringe Benefit set-aside on the Reservation of Funds worksheet, does documentation exist to show how the calculation was derived. (If not used, select NA)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Spreadsheet demonstrating calculations	<table border="1"> <thead> <tr> <th data-bbox="1663 766 2055 818">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1663 818 2055 1099">2/14/2020 1:02:10 PM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not use Title IA funding for Salary and Fringe Benefit set-aside.</td> </tr> <tr> <th data-bbox="1663 1099 2055 1151">Monitor Comments</th> </tr> <tr> <td data-bbox="1663 1151 2055 1395">4/26/2021 6:56:15 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School does not use Title IA funding for Salary and Fringe Benefit set-aside.</td> </tr> </tbody> </table>	District Comments	2/14/2020 1:02:10 PM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not use Title IA funding for Salary and Fringe Benefit set-aside.	Monitor Comments	4/26/2021 6:56:15 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School does not use Title IA funding for Salary and Fringe Benefit set-aside.
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	6. The LEA indicated the use of Optional set asides, such as audit, community day programs, district wide professional development, pupil transportation, pre-school programs, program evaluation, summer and intersession programs, state and federal liaison on the set-aside Reservation of Funds worksheet.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> LEA Title I budget and expenditures	<table border="1"> <thead> <tr> <th data-bbox="1663 131 2055 180">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1663 180 2055 461">2/14/2020 1:02:43 PM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not use Title IA funding for optional set-asides.</td> </tr> <tr> <th data-bbox="1663 461 2055 509">Monitor Comments</th> </tr> <tr> <td data-bbox="1663 509 2055 751">4/26/2021 6:56:26 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School does not use Title IA funding for optional set-asides.</td> </tr> </tbody> </table>	District Comments	2/14/2020 1:02:43 PM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not use Title IA funding for optional set-asides.	Monitor Comments	4/26/2021 6:56:26 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School does not use Title IA funding for optional set-asides.
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16. Transferability Sec 5103(b)	1. Up to 100% of Title II and IV funds can be transferred. Funds can be transferred into Title I and Title III but not out of either subprogram. Title IIA and IV can transfer between programs.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Expenditures aligned to transferred into subprogram  <input type="checkbox"/> Consolidated Application, Transferability page	<table border="1"> <thead> <tr> <th data-bbox="1663 768 2055 816">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1663 816 2055 1060">2/14/2020 11:16:27 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not transfer funds across grants.</td> </tr> <tr> <th data-bbox="1663 1060 2055 1109">Monitor Comments</th> </tr> <tr> <td data-bbox="1663 1109 2055 1318">4/26/2021 6:56:39 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School does not transfer funds across grants.</td> </tr> </tbody> </table>	District Comments	2/14/2020 11:16:27 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not transfer funds across grants.	Monitor Comments	4/26/2021 6:56:39 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School does not transfer funds across grants.
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4/26/2021 6:56:39 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School does not transfer funds across grants.										



Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments				
	2. Evidence that Nonpublic school consultation to discuss transfer of funds occurred prior to the transfer of funds.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Agendas/sign in sheets <input type="checkbox"/> Emails <input type="checkbox"/> Other documentation to reflect consultation occurred prior to the transfer of funds	<table border="1"> <thead> <tr> <th data-bbox="1661 128 2055 180">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1661 180 2055 461">           2/14/2020 11:16:44 AM            Federal Program Coordinator Zofia Swiatek            Pennsylvania Leadership Charter School does not transfer grants and does not serve non-public schools.         </td> </tr> <tr> <th data-bbox="1661 461 2055 513">Monitor Comments</th> </tr> <tr> <td data-bbox="1661 513 2055 760">           4/26/2021 6:57:23 AM            Monitor Adem Oksuz            Pennsylvania Leadership Charter School does not transfer grants and does not serve non-public schools.         </td> </tr> </tbody> </table>	District Comments	2/14/2020 11:16:44 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not transfer grants and does not serve non-public schools.	Monitor Comments	4/26/2021 6:57:23 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School does not transfer grants and does not serve non-public schools.
District Comments										
2/14/2020 11:16:44 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not transfer grants and does not serve non-public schools.										
Monitor Comments										
4/26/2021 6:57:23 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School does not transfer grants and does not serve non-public schools.										
If you have additional comments to make about this section, enter them here:										
17. Time Documentation UGG Section 200.430	1A. The LEA maintains semi-annual certifications for all employees paid through a federal grant and working on a single cost objective. Single funding certifications are signed after the fact by the employee or supervisor with direct knowledge of the employee's activities.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Semi-annual time certifications					

Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments				
	1B. If LEA is using single funding certifications to document time for an employee with a fixed schedule, prior written approval from DFP was obtained.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Documentation of Fixed schedule semi-annual time documentation DFP approval	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th data-bbox="1663 128 2055 180" style="text-align: center;">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1663 180 2055 496">           4/9/2021 1:28:59 PM            Federal Program Coordinator Zofia Swiatek            Pennsylvania Leadership Charter School does not fund split-funded employees with fixed schedules out of Title I funds.         </td> </tr> <tr> <th data-bbox="1663 496 2055 548" style="text-align: center;">Monitor Comments</th> </tr> <tr> <td data-bbox="1663 548 2055 826">           4/26/2021 6:56:53 AM            Monitor Adem Oksuz            Pennsylvania Leadership Charter School does not fund split-funded employees with fixed schedules out of Title I funds.         </td> </tr> </tbody> </table>	District Comments	4/9/2021 1:28:59 PM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not fund split-funded employees with fixed schedules out of Title I funds.	Monitor Comments	4/26/2021 6:56:53 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School does not fund split-funded employees with fixed schedules out of Title I funds.
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Monitor Comments										
4/26/2021 6:56:53 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School does not fund split-funded employees with fixed schedules out of Title I funds.										

Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments				
	<p>2. The LEA maintains Personnel Activity Reports (PARs) for employees who works on multiple cost objectives and are paid in full or in part from a federal grant. PARs include 100% of the employees time, are broken out by multiple cost objectives, are signed by the employee after the fact, are collected multiple times a year and are reconciled against payroll records so that the total amount charged to the federal grant is supported by the PARs.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Time logs <input type="checkbox"/> Staff schedules	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #cccccc;">District Comments</th> </tr> </thead> <tbody> <tr> <td>2/14/2020 11:17:42 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not have any employees who work on multiple cost objectives under this year's Title IA grant.</td> </tr> <tr> <th style="background-color: #cccccc;">Monitor Comments</th> </tr> <tr> <td>4/26/2021 6:57:07 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School does not have any employees who work on multiple cost objectives under this year's Title IA grant.</td> </tr> </tbody> </table>	District Comments	2/14/2020 11:17:42 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not have any employees who work on multiple cost objectives under this year's Title IA grant.	Monitor Comments	4/26/2021 6:57:07 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School does not have any employees who work on multiple cost objectives under this year's Title IA grant.
District Comments										
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Monitor Comments										
4/26/2021 6:57:07 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School does not have any employees who work on multiple cost objectives under this year's Title IA grant.										

**Desk Monitoring only:**

- Upload inventory list for public and Non-public programs
- Upload data reports/summaries
- Upload Conflict of Interest Policy and Travel Reimbursement Policy, Cash Management Procedure, Allowability of Costs Procedure and Procurement Procedure
- Upload Carryover Waiver Approval Letter, if applicable
- Upload building level budgets for each Title I building
- Upload Documentation of LEA methodology for allocating state and local funds to buildings.
- For LEAs not exempt, upload Comparability Assurance page and Detailed data sheet. For those LEAs that are exempt, upload Assurance page.
- Upload MOE letter from PDE
- Upload agendas, sign in sheets, emails, or other documentation to reflect Non-public consultation occurred.

- [Title I Fiscal - Component I - UGG - Requirement 3 - Obligation of Funds - Title I Master.pdf](#)
- [Title I Fiscal - Component I - UGG - Requirement 5 - Performance Goal Reporting Verification - Back Up Documentation.pdf](#)
- [Title I Fiscal - Component I - UGG - Requirement 6 - Conflict of Interest Policy.pdf](#)
- [Title I Fiscal - Component I - UGG - Requirement 7 - Allowability of Costs Policy.pdf](#)
- [Title I Fiscal - Component I - UGG - Requirement 8 - Procurement Procedures Policy.pdf](#)
- [Title I Fiscal - Component I - UGG - Requirement 9 - Cash Management Procedures Policy.pdf](#)
- [Title I Fiscal - Component I - UGG - Requirement 10 - Travel Reimbursement Policy.pdf](#)
- [Title I Fiscal - Component I - UGG - Requirement 1 - 2017 Single Audit.pdf](#)

Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
						<a href="#">Title I Fiscal - Component I - UGG - Requirement 1 - 2018 Single Audit.pdf</a> <a href="#">Title I Fiscal - Component I - UGG - Requirement 14 - Comparability Assurances.pdf</a> <a href="#">Title I Fiscal - Component I - UGG - Requirement 17 - Time Documentation - 1A.pdf</a>

**Community Eligibility Provision (CEP) 7 CFR 245.9(f)97) (iii)**

The Healthy, Hunger-Free Kids Act of 2010 (Public Law 111-296) offers LEAs an alternative to collecting household applications in the National School Lunch and National School Breakfast Programs, which eliminates unnecessary paperwork previously required by the Richard B. Russell National School Lunch Act. The CEP is a reimbursement option for eligible LEAs and schools that wish to offer free meals to all children in high-poverty schools.

**If the LEA does not use the Community Eligibility Provision (CEP), this section can be skipped.**

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<p>1. Did your LEA have schools that participated in the Community Eligibility Provision (CEP) during the 18-19 SY? This is asked for 19-20 monitoring because data from the previous year is used for the current year Selection of Schools and Nonpublic Equitable Share data</p> <p>Note: If your LEA has schools that have adopted CEP for the first time during the 19-20 SY this answer is "no".                      Note: If a "no" answer the remaining questions can be marked N/A.</p> <p><b>Please note: the LEA does not need to provide copies of the Consolidated Application as evidence. The monitor will view prior to monitoring. By checking this as met you are ensuring compliance with this requirement.</b></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p><input type="checkbox"/> Consolidated Application, Selection of Schools</p>	

Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<p>2. LEA has a data source/process that was used to ensure that CEP building low-income data was uniform with other non-CEP buildings and/or was equitable in regard to nonpublic schools. <b>Please note: the LEA does not need to provide copies of the Consolidated Application as evidence. The monitor will view prior to monitoring. By checking this as met you are ensuring compliance with this requirement.</b></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Consolidated Application Selection of Schools</li> <li><input type="checkbox"/> The 1.6 multiplier was applied against CEP data from participating schools to make it uniform with traditional Free and Reduced Lunch data at non-CEP schools.</li> <li><input type="checkbox"/> Raw CEP/Direct Certification (DC) data was utilized at all schools in a uniform manner without a multiplier and regardless of whether or not a school was CEP participating or not.</li> <li><input type="checkbox"/> A survey that looked like the old Free and Reduced lunch survey - but which made clear that it was not a requirement of the food subsidy program - was sent to participating CEP schools. Non-CEP schools would use the traditional free and reduced forms.</li> </ul>	

## Title II A: Fiscal

### Requirements

Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<p>1. Supplement/Supplant</p> <p>The LEA ensures that Federal funds are used only to supplement or increase non-Federal sources used for the education of participating students and not to supplant funds from non-Federal sources</p> <p>Sec. 1118(b)</p>	<p>1. Title II - the LEA approved budget and records of expenditures of Title II funds match</p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p><input type="checkbox"/> Title II budgets</p> <p><input type="checkbox"/> LEA budget</p> <p><input checked="" type="checkbox"/> Statement of Expenditures for Title II</p>	
<p>2. Time Documentation</p> <p>UGG 200.430</p>	<p>1A. The LEA maintains semi-annual certifications for all employees paid through a federal grant and working on a single cost objective. Single funding certifications are signed after the fact by the employee or supervisor with direct knowledge of the employee's activities.</p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p><input checked="" type="checkbox"/> Semi-annual time certifications</p>	

Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments				
	1B. If LEA is using single funding certifications to document time for an employee with a fixed schedule, prior written approval from DFP was obtained.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Documentation of Fixed schedule semi-annual time documentation DFP approval	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th data-bbox="1619 126 2049 175" style="text-align: center;">District Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="1619 175 2049 500"> <p>4/9/2021 1:26:58 PM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School did not use Title IIA funding to pay for any split-funded employees with fixed schedules.</p> </td> </tr> <tr> <th data-bbox="1619 500 2049 548" style="text-align: center;">Monitor Comments</th> </tr> <tr> <td data-bbox="1619 548 2049 831"> <p>4/26/2021 6:58:48 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School did not use Title IIA funding to pay for any split-funded employees with fixed schedules.</p> </td> </tr> </tbody> </table>	District Comments	<p>4/9/2021 1:26:58 PM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School did not use Title IIA funding to pay for any split-funded employees with fixed schedules.</p>	Monitor Comments	<p>4/26/2021 6:58:48 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School did not use Title IIA funding to pay for any split-funded employees with fixed schedules.</p>
District Comments										
<p>4/9/2021 1:26:58 PM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School did not use Title IIA funding to pay for any split-funded employees with fixed schedules.</p>										
Monitor Comments										
<p>4/26/2021 6:58:48 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School did not use Title IIA funding to pay for any split-funded employees with fixed schedules.</p>										



Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
	<p>2. The LEA maintains Personnel Activity Reports (PARs) for employees who works on multiple cost objectives and are paid in full or in part from a federal grant. PARs include 100% of the employees time, are broken out by multiple cost objectives, are signed by the employee after the fact, are collected multiple times a year and are reconciled against payroll records so that the total amount charged to the federal grant is supported by the PARs.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Time logs <input type="checkbox"/> Staff schedules	<div style="background-color: #cccccc; padding: 2px;"><b>District Comments</b></div> <p>2/14/2020 11:45:30 AM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School did not use Title IIA funding to pay for any employees who work on multiple cost objectives, therefore this does not apply.</p> <div style="background-color: #cccccc; padding: 2px;"><b>Monitor Comments</b></div> <p>4/26/2021 6:58:59 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School did not use Title IIA funding to pay for any employees who work on multiple cost objectives, therefore this does not apply.</p>
<p>3. Performance Goal Reporting Verification</p> <p>UGG 200.328</p>	<p>1. LEA has submitted the Performance Goal Output Report for Title II by the due date. <b>Please note: the LEA does not need to provide copies of the Consolidated Application as evidence. The monitor will view prior to monitoring. By checking this as met you are ensuring compliance with this requirement.</b></p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Consolidated Application, Performance Goal Output Report in Title II.	
	<p>2. Backup documentation exists for the performance goal report that aligns with the data indicated in the goals that would be used to determine success.</p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Data reports/ summaries	

Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments				
4. Equipment and Related Property  UGG 200.313	1. LEA maintains Inventory records, purchase orders and receipts for equipment (over \$5,000) purchased and Computing Devices and Special Purpose Equipment (\$300 - \$4,999)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Inventory list of items purchased with Title IIA	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #cccccc;">District Comments</th> </tr> </thead> <tbody> <tr> <td>           2/14/2020 1:01:03 PM            Federal Program Coordinator Zofia Swiatek            Pennsylvania Leadership Charter School has not purchased any equipment or devices with Title IIA funding, therefore this does not apply.         </td> </tr> <tr> <th style="background-color: #cccccc;">Monitor Comments</th> </tr> <tr> <td>           4/26/2021 6:59:10 AM            Monitor Adem Oksuz            Pennsylvania Leadership Charter School has not purchased any equipment or devices with Title IIA funding, therefore this does not apply.         </td> </tr> </tbody> </table>	District Comments	2/14/2020 1:01:03 PM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School has not purchased any equipment or devices with Title IIA funding, therefore this does not apply.	Monitor Comments	4/26/2021 6:59:10 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School has not purchased any equipment or devices with Title IIA funding, therefore this does not apply.
District Comments										
2/14/2020 1:01:03 PM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School has not purchased any equipment or devices with Title IIA funding, therefore this does not apply.										
Monitor Comments										
4/26/2021 6:59:10 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School has not purchased any equipment or devices with Title IIA funding, therefore this does not apply.										
Desk monitoring only: <ul style="list-style-type: none"> <li>Upload data reports supporting performance goal output report</li> <li>Upload Title II budget</li> <li>Appropriate Time Documentation</li> </ul>		<a href="#">Title II Fiscal - Requirements - Requirement 2 - Time Documentation - 1A.pdf</a> <a href="#">Title II Fiscal - Requirements - Requirement 3 - Performance Goal Reporting Verification - 2.pdf</a> <a href="#">Title II Fiscal - Requirements - Requirement 1 - Supplement-Supplamt - Expenditures.pdf</a>								
If you have additional comments to make about this section, enter them here:										

# Title IVA: Fiscal

## Requirements

Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments		
<p>1. Supplement/Supplant</p> <p>The LEA ensures that Federal funds are used only to supplement or increase non-Federal sources used for the education of participating students and not to supplant funds from non-Federal sources</p> <p>Sec. 1118(b)</p>	<p>1. Title IV (where applicable) - the LEA approved budget and records of expenditures of Title IV funds match.</p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Title IV budgets  <input type="checkbox"/> LEA budget <input checked="" type="checkbox"/> Statement of Expenditures for Title IV			
<p>2. Performance Goal Reporting Verification</p> <p>UGG 200.328</p>	<p>1. LEA has submitted the Performance Goal Output Report for Title IV by the due date. <b>Please note: the LEA does not need to provide copies of the Consolidated Application as evidence. The monitor will view prior to monitoring. By checking this as met you are ensuring compliance with this requirement.</b></p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Consolidated Application, Performance Goal Output Report in Title IV.			
	<p>2. Backup documentation exists for the performance goal report that aligns with the data indicated in the goals that would be used to determine success.</p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Data reports/ summaries			
<p>3. Time Documentation</p> <p>UGG 200.430</p>	<p>1A. The LEA maintains semi-annual certifications for all employees paid through a federal grant and working on a single cost objective. Single funding certifications are signed after the fact by the employee or supervisor with direct knowledge of the employee's activities.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Semi-annual time certifications	<table border="1"> <thead> <tr> <th>District Comments</th> </tr> </thead> <tbody> <tr> <td>           2/14/2020 1:16:53 PM            Federal Program Coordinator            Zofia Swiatek            Pennsylvania Leadership Charter School does not have any single cost objective employees being paid for out of Title IVA funding.         </td> </tr> </tbody> </table>	District Comments	2/14/2020 1:16:53 PM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not have any single cost objective employees being paid for out of Title IVA funding.
District Comments								
2/14/2020 1:16:53 PM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not have any single cost objective employees being paid for out of Title IVA funding.								

Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
	1B. If LEA is using single funding certifications to document time for an employee with a fixed schedule, prior written approval from DFP was obtained.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Documentation of Fixed schedule semi-annual time documentation DFP approval	
	2. The LEA maintains Personnel Activity Reports (PARs) for employees who works on multiple cost objectives and are paid in full or in part from a federal grant. PARs include 100% of the employees time, are broken out by multiple cost objectives, are signed by the employee after the fact, are collected multiple times a year and are reconciled against payroll records so that the total amount charged to the federal grant is supported by the PARs.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Time logs <input type="checkbox"/> Staff schedules	<b>District Comments</b> 4/10/2021 1:08:14 PM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not have any employees being funded from multiple cost objectives in Title IV.
4. Equipment and Related Property  UGG 200.313	1. LEA maintains Inventory records, purchase orders and receipts for equipment (over \$5,000) purchased and Computing Devices and Special Purpose Equipment (\$300 - \$4,999)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Inventory list of items purchased with Title IV	<b>District Comments</b> 2/14/2020 1:25:53 PM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School did not allocate Title IVA for any equipment purchases. <b>Monitor Comments</b> 4/26/2021 7:03:33 AM Monitor Adem Oksuz Pennsylvania Leadership Charter School did not allocate Title IVA for any equipment purchases.

Desk monitoring only:

- Upload data reports supporting performance goal output report
- Upload Title IV budget

[Title IV - Requirements - Requirement 3 - Time Documentation - 1B Monthly Time Tracking Sheet.pdf](#)

[Title IV - Requirements - Requirement 3 - Time Documentation - 1B Monthly Certification Form.pdf](#)

Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
<ul style="list-style-type: none"> <li>Appropriate Time Documentation</li> </ul>					<a href="#">Title IV Fiscal - Requirements - Requirement 1 - Supplement-Supplant - Expenditures.pdf</a> <a href="#">Title IV Fiscal - Requirements - Requirement 2 - Performance Goal Verification.pdf</a>	
<p>If you have additional comments to make about this section, enter them here:</p>						

## Personnel Interviews

<b>Building</b>	<b>Date</b>	<b>Staff Member Interviewed</b>	<b>Staff Member Position</b>
Charter Choices	4/26/2021	Roger Masch	Consultant from Charter Choices
Pennsylvania Leadership Charter School	4/26/2021	Dr.Karla Johnson	Middle School Principal
Pennsylvania Leadership Charter School	4/26/2021	Zofia Swiatek	Federal Programs Coordinator

**Division of Federal Program  
Consolidated Program Review  
2019-2020 School Year  
Pennsylvania Leadership Charter School  
Pennsylvania Leadership Charter School**

**SCHOOL Level Monitoring**

	<b>Name</b>	<b>Check if Interviewed</b>
Principal:	Mark Allen, Director of Academics _____	<input type="checkbox"/>
Parent:	Dr. Karla Johnson _____	<input checked="" type="checkbox"/>
Parent:	_____	<input type="checkbox"/>
Parent:	_____	<input type="checkbox"/>
Parent:	_____	<input type="checkbox"/>
Parent:	_____	<input type="checkbox"/>

Program Reviewers: Adam Kenz                      Visit Date: 4/26/2021

# School Level Monitoring

## Component I: Requirements

Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments		
1. Time Documentation UGG Sec. 200.430	1A. The LEA maintains semi-annual certifications for all employees paid through a federal grant and working on a single cost objective. Single funding certifications are signed after the fact by the employee or supervisor with direct knowledge of the employee's activities.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Semi-annual time certifications			
	1B. If LEA is using single funding certifications to document time for an employee with a fixed schedule, prior written approval from DFP was obtained.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Documentation of Fixed schedule semi-annual time documentation DFP approval			
	2. The LEA maintains Personnel Activity Reports (PARs) for employees who works on multiple cost objectives and are paid in full or in part from a federal grant. PARs include 100% of the employees time, are broken out by multiple cost objectives, are signed by the employee after the fact, are collected multiple times a year and are reconciled against payroll records so that the total amount charged to the federal grant is supported by the PARs.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Time logs <input type="checkbox"/> Staff schedules	<table border="1"> <thead> <tr> <th>District Comments</th> </tr> </thead> <tbody> <tr> <td>4/10/2021 1:26:41 PM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not fund employees with multiple cost objectives through this grant.</td> </tr> </tbody> </table>	District Comments	4/10/2021 1:26:41 PM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not fund employees with multiple cost objectives through this grant.
District Comments								
4/10/2021 1:26:41 PM Federal Program Coordinator Zofia Swiatek Pennsylvania Leadership Charter School does not fund employees with multiple cost objectives through this grant.								
2. Building Level Budget	1. The LEA and Title I School maintain a building level budget documenting <b>ALL</b> Title I expenditures	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> School's Title I building level budget including specific salary and benefits for personnel and supply orders for actual and anticipated expenditures, must be used for this analysis			
Desk Monitoring Only: <ul style="list-style-type: none"> <li>• Upload staff semi-annual certification and/or time logs</li> <li>• Upload schools Title I building level budget including specific salary and benefits for personnel and supply orders for actual and anticipated expenditures.</li> </ul>					<a href="#">School Level Monitoring Fiscal - Component 1 - Requirements - Requirement 1 - Time Documentation.pdf</a> <a href="#">School Level Monitoring Fiscal - Component 1 - Requirements - Requirement 2 - Building Level Budget.pdf</a>			



Description	Requirements	Met	Not Met	N/A	Suggested Evidence of Implementation	Comments
If you have additional comments to make about this section, enter them here:						



## **Executive Summary BSE Compliance Monitoring Review of the Pennsylvania Leadership CS**

### **PART I SUMMARY OF FINDINGS**

#### **A. Review Process**

Prior to the Bureau's monitoring the week of January 7, 2019, the Pennsylvania Leadership CS was formally notified of the dates the onsite review would be conducted. Notice and invitation to comment was also provided to the Local Task Force on Right-to-Education. The charter school was informed of its responsibility to compile various reports, written policies, and procedures to document compliance with requirements.

While onsite, the monitoring team employed a variety of techniques to gain an in depth understanding of the charter school's program operations. This included:

- Interviews of charter school administrative and instructional personnel
- Review of policies, notices, plans, outcome and performance data, special education forms and formats, and data reports used and compiled by the charter school (Facilitated Self-Assessment)
- Comprehensive case studies (including classroom observations, student file reviews, and interviews of parents and general and special education teachers).

#### **B. General Findings**

In reaching compliance determinations, the Bureau of Special Education (BSE) monitoring teams apply criteria contained in federal and state special education regulations. Specifically, these are:

- Individuals with Disabilities Education Improvement Act of 2004
- 22 Pa. Code Chapter 711
- 34 CFR Part 300

This report focuses on compliance with regulatory requirements and also contains descriptive information (such as interview and survey results) intended to provide feedback to assist in program planning.

#### **C. Overall Findings**

##### **1. FACILITATED SELF ASSESSMENT (FSA)**

The team reviewed the FSA submitted by the charter school and conducted onsite verification activities of the information submitted in the FSA. The onsite verification activities included review of policies, notices, procedures, and file reviews.

<b>FSA</b>	<b>In Compliance</b>	<b>Out of Compliance</b>
Assistive Technology and Services; Hearing Aids	2	0
Positive Behavior Support Policy	1	0
Child Find (Annual Public Notice and General Dissemination Materials)	1	0
Confidentiality	1	0
Dispute Resolution (Due process hearing decision implementation)	0	0
Exclusions: Suspensions and Expulsions (Procedural Requirements)	0	0
Independent Education Evaluation	1	0
Least Restrictive Environment (LRE)	1	0
Provision of Extended School Year Services	1	0
Provision of Related Service Including Psychological Counseling	1	0
Parent Training	0	1
Public School Enrollment	1	0
Surrogate Parents (Students Requiring)	1	0
Personnel Training	1	0
Intensive Interagency Approach	0	0
Summary of Academic Achievement and Functional Performance/Procedural Safeguard Requirements for Graduation	1	0
SPP/APR Indicator 13 (Transition)	0	1
Disproportionate Representation that is the Result of Inappropriate Identification	1	0

<b>IMPROVEMENT PLAN REQUIRED*</b>	<b>Yes</b>	<b>No</b>
Effective Use of Dispute Resolution	0	0
Graduation Rates (SPP)	1	0
Dropout Rates (SPP)	1	0
Suspensions (Rates)	0	0
Least Restrictive Environment (LRE) (SPP)	0	1
Participation in PSSA and PASA (SPP)	1	0
Participation in Charter-Wide Assessment	0	1
Public School Enrollment	0	1
Disproportionate Representation that is the Result of Inappropriate Identification	0	1

\*This determination is based on the data used for the monitoring. More recent data provided by the LEA may demonstrate that the LEA does not require an improvement plan for this topic. Please refer to the Corrective Action Verification/Compliance and Improvement Plan for final guidance.

## 2. **FILE REVIEW** (Student case studies)

The education records of randomly selected students participating in special education programs were studied to determine whether the charter school complied with essential requirements.

The status of compliance of the Pennsylvania Leadership CS is as follows:

<b>Sections of the FILE REVIEW</b>	<b>In Compliance</b>	<b>Out of Compliance</b>	<b>NA</b>
Essential Student Documents Are Present and Were Prepared Within Timelines	85	4	71
Evaluation/Reevaluation: Process and Content	243	11	526
Individualized Education Program: Process and Content	441	48	311
Procedural Safeguards: Process and Content	107	9	4
<b>TOTALS</b>	<b>876</b>	<b>72</b>	<b>912</b>

### 3. TEACHER AND PARENT INTERVIEWS

Interviews were conducted with parents and teachers of students selected by the BSE for the sample group. The goal is to determine if the charter school involves parents and professionals in required processes (e.g., evaluation, IEP development), whether programs and services are being provided, and whether the charter school provides training to enhance knowledge. Parent and teacher satisfaction with the special education program is also generally assessed.

	<b># Yes Responses</b>	<b># No Responses</b>	<b># of Other Responses</b>
Program Implementation: General Ed Teacher Interviews	157	0	41
Program Implementation: Special Ed Teacher Interviews	290	3	116
Program Implementation: Parent Interviews	123	9	87
<b>TOTALS</b>	<b>570</b>	<b>12</b>	<b>244</b>

### 4. CLASSROOM OBSERVATIONS

Observations are conducted in classrooms of students selected by the BSE for the sample group.

	<b># Yes Responses</b>	<b># No Responses</b>	<b># of Other Responses</b>
Classroom Observations	4	0	3

### 5. EDUCATIONAL BENEFIT REVIEW

	<b>In Compliance</b>	<b>Out of Compliance</b>
Educational Benefit Review		X

## PART II CORRECTIVE ACTION PROCESS

PART I of this report presented an overall summary of findings. In the Appendix to the report, we have provided the detailed findings for each of the criteria of the compliance monitoring document, i.e. FSA, File Reviews, Interviews and Classroom Observations. The detailed report of findings includes:

- Criteria Number
- Statements of all requirements
- Whether each requirement was met, not met, not applicable or other
- Statements of corrective action required for those criteria not met. ***Criteria not met that require corrective action by the charter school are gray-shaded.***

***Charter schools are advised that in accordance with requirements of the Individuals with Disabilities Education Act, all noncompliance must be corrected as soon as possible but in no case later than one year from the date of the monitoring report.*** The BSE is required to verify timely correction of noncompliance, and must report annually to the federal government and the public on this requirement.

Upon receipt of this report, the charter school should review the corrective action and improvement planning required. The report is formatted so that findings from all components of the monitoring are consolidated by topical area. The report lists the finding, and whether corrective action is required. For certain types of findings, corrective action will be prescribed, and will not vary from charter school to charter school. For example, if the finding is that the charter school lacks a specific required policy, it is reasonable to have the BSE prescribe a standardized remedy and timeline for correcting this deficiency. However, the majority of corrective action activities will be individually designed by the charter school based on their own unique circumstances and goals. Consistent with IDEA's general supervision requirements for states, BSE must approve all proposed corrective action.

With respect to the File Review, because students were selected at random, findings are generalized to the entire population of students with disabilities. During the corrective action review, the BSE Advisor will select students at random and will review updated data, i.e. records that were developed subsequent to the monitoring. Consequently, the charter school should approach corrective action on a systemic basis. As indicated above, the charter school is also required to correct student specific noncompliance identified during monitoring under the ICAP process. If there has been a finding of noncompliance in the Educational Benefit Review component, the individual students are identified to the charter school and, because of the significance of the provision of a free appropriate public education (FAPE) to these students; the charter school must take immediate corrective action.

The BSE Adviser will schedule an onsite visit with the charter school within 60 days following issuance of the monitoring report. The BSE Adviser, charter school, and PaTTAN staff will develop a Charter School Corrective Action Verification/Compliance and Improvement Plan. PaTTAN and IU staff are available to assist the charter school.

Upon conclusion of the corrective action process, the charter school will be notified of its successful completion of the monitoring process.

## Charter School Corrective Action Verification/Compliance and Improvement Plan - Bureau of Special Education

This form is designed to serve both as a planning tool and as verification of completion of corrective action.

Charter School: Pennsylvania Leadership CS

Chief Executive Officer: Dr. James Hanak

Special Education Director/Coordinator: Kerry Duke

BSE Special Education Adviser: Dr. Beth Marvin

Date of Report: April 23, 2019

Date Final Report Sent to LEA: February 26, 2019

**Reminder: The timelines for corrective action of all non-compliance items may not exceed ONE YEAR from the Date Final Report Sent to LEA**

First Visit Date: February 27, 2019

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
						<b>Topical Area 1: Policies, Practices, and Procedures</b>			
Y						1. <b>FSA-ASSISTIVE TECHNOLOGY AND SERVICES</b>  <b>Standard:</b> The Local Education Agency (LEA) observed the requirement that the provision of assistive technology is reflected in the student's IEP			
Y						1A. <b>FSA-HEARING AIDS</b>  <b>Standard:</b> Each public agency shall ensure that the hearing aids worn in school by children with hearing impairments, including deafness, are functioning properly. Each public agency must ensure that the external components of surgically implanted medical devices are functioning properly			
Y						2. <b>FSA-POSITIVE BEHAVIOR SUPPORT</b>  <b>Standard:</b> LEA complies with the positive behavior support policy requirements.			
Y						3. <b>FSA-CHILD FIND</b>  <b>Standard:</b> LEA demonstrates compliance with annual public notice requirements.			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
Y						4. <b>FSA-CONFIDENTIALITY</b>  Standard The LEA is in compliance with confidentiality requirements.			
		X				5. <b>FSA-DISPUTE RESOLUTION (DUE PROCESS HEARING DECISION IMPLEMENTATION)</b>  Standard The LEA uses dispute resolution processes for program improvement.			
		X				8. <b>FSA-PROCEDURAL REQUIREMENTS FOR SUSPENSION</b>  Standard: The LEA adheres to procedural requirements in suspending students with disabilities.			
Y						10. <b>FSA-INDEPENDENT EDUCATIONAL EVALUATION</b>  Standard: The LEA documents a procedure for responding to requests made by parents for an independent educational evaluation at public expense.			
Y						11A. <b>FSA-LEAST RESTRICTIVE ENVIRONMENT</b>  Standard: The LEA's continuum of special education services supports the availability of LRE under 34 CFR Part 300.			
Y						12. <b>FSA-EXTENDED SCHOOL YEAR SERVICES</b>			
Y						13. <b>FSA-RELATED SERVICE INCLUDING PSYCHOLOGICAL COUNSELING</b>			
	N					15. <b>FSA-PARENT TRAINING</b>  Standard: Parent opportunities for training and information sharing address the special knowledge, skills and abilities needed to serve the unique needs of children with disabilities.	The LEA will develop an improvement plan to address the training needs and information sharing opportunities for parents who have children with disabilities.  Evidence of Change: The LEA will provide SPOC with improvement plan by August 25, 2019.	02/26/2020 LEA IU Representative PaTTAN staff BSE Adviser	
						<b>INTERVIEW RESULTS (Parent)</b>			
						P 62. My school district/charter school makes available training related to the needs of students with disabilities that I could attend.			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
					3 0 0 0 3 0	Always Sometimes Rarely Never Don't Know Does not Apply			
					2 0 0 0 4 0	P 63. My school district/charter school invites parents to trainings that are available to school staff regarding research based best practices, supplementary aids and services, differentiating instruction and modifying the general education curriculum. Always Sometimes Rarely Never Don't Know Does not Apply			
Y						18. <b>FSA-SURROGATE PARENTS (STUDENTS REQUIRING)</b>  <b>Standard:</b> The LEA identifies eligible students in need of surrogate parents and recruits, selects, trains, and assigns in a timely manner.			
Y						19. <b>FSA-PERSONNEL TRAINING</b>  <b>Standard:</b> In-service training appropriately and adequately prepares and trains personnel to address the special knowledge, skills, and abilities to serve the unique needs of children with disabilities, including those with low incidence disabilities, when applicable.			
						<b>INTERVIEW RESULTS (General &amp; Special Education Teacher)</b>			
6	0	0				GE 88. Do you receive training regarding how to differentiate instruction and modify the curriculum in your classroom?			
6	0	0				GE 89. Do you receive training regarding how to provide positive behavior supports for students with negative behaviors?			
6	0	0				GE 90. If you have a student with a behavioral need, have you been trained how to deescalate negative and aggressive student behavior?			
6	0	0				GE 91. Do you participate in determining the kinds of training and technical assistance needed to support students with IEPs in regular education classrooms?			



Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
4	0	2				GE 94. If a student has AT included in his/her current IEP, have you received training in AT, and accessing AT resources?			
8	0	1				SE 124. Do you collaborate with general education teachers and administrators to recommend training needs for personnel within the LEA?			
		X				20. <b>FSA-INTENSIVE INTERAGENCY APPROACH</b>  <b>Standard:</b> The LEA identifies, reports, and provides for the provision of Free Appropriate Public Education (FAPE) for all students with disabilities including those students needing intensive interagency approaches.			
Y						21. <b>FSA-SUMMARY OF ACADEMIC AND FUNCTIONAL PERFORMANCE/PROCEDURAL SAFEGUARD REQUIREMENTS FOR GRADUATION</b>  <b>Standard:</b> The LEA provides Summary of Academic Achievement and Functional Performance for children whose eligibility terminates due to graduation or aging out. The LEA provides required prior written notice for graduation			
	N					21A. <b>TRANSITION REQUIREMENTS</b>  <b>Standard:</b> The LEA complies with requirements for transition planning for students.	The LEA has been provided with the names of individual students for whom corrective action is required.  Evidence of Change: The LEA will provide SPOC with revised documents regarding transition sections of the IEP that are based upon current assessments and interviews.	02/26/2020 LEA IU Representative PaTTAN staff BSE Adviser	
						<b>Topical Area 2: Delivery of Service</b>			
Y						17. <b>FSA-PUBLIC SCHOOL ENROLLMENT</b>  <b>Standard:</b> The LEA's percentage of children with disabilities served in special education is comparable to state data.			
Y						17B. <b>FSA-PUBLIC SCHOOL ENROLLMENT</b>  <b>Standard:</b> Timely provision of FAPE for students who transfer public agencies within state, and from another state.			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
Y						22. <b>FSA-DISPROPORTIONATE REPRESENTATION THAT IS THE RESULT OF INAPPROPRIATE IDENTIFICATION</b>  <b>Standard:</b> LEA does not demonstrate disproportionate representation of racial/ethnic groups receiving special education or by disability group.			
	N					23. <b>FSA-EDUCATIONAL BENEFIT REVIEW</b>  <b>Standard:</b> The IEP meets procedural compliance and is reasonably calculated to enable the child to advance appropriately toward attaining their annual goals.	The LEA has been provided with the names of individual students for whom corrective action is required within 30 days of the date of this report.	03/28/2019	02/27/2019
						<b>CLASSROOM OBSERVATIONS</b>			
1	0	0		0		CO 1. Is the instruction provided to the student individualized as required by his/her IEP?			
1	0	0		0		CO 2. Is the instruction being provided in accordance with the goals in the student's IEP?			
1	0	0		0		CO 3. If assistive technology is included in the student's IEP and required for the activity observed, is it being used?			
0	0	1		0		CO 4. If the student is in a regular education setting, is he/she participating in the lesson taught by the general education teacher or a co-teacher?			
0	0	1		0		CO 5. If the student is in a regular education setting, is the student appropriately integrated (physically) in the class?			
0	0	0		1		CO 6. If the student's IEP contains supplementary aids and/or services, are they being delivered in the classroom setting as required?			
1	0	0		0		CO 7. Does this setting coincide with the student's IEP with regard to the extent to which the student is educated with non-disabled peers?			
						<b>INTERVIEW RESULTS (Parent, General &amp; Special Education Teacher)</b>			
						P 55. My child does classroom work in a regular classroom with students without disabilities.  2 Always 1 Sometimes 0 Rarely 0 Never 1 Don't Know 2 Does not Apply			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
					4 1 0 0 0 1	P 56. My child participates or has the opportunity to participate in school activities other than classroom work, including extra-curricular activities, with students without disabilities.  Always Sometimes Rarely Never Don't Know Does not Apply			
					4 0 0 0 0 2	P 56a. My child goes on field trips, attends school functions and/or participates in extracurricular activities with their same age/grade peers who are non-disabled.  Always Sometimes Rarely Never Don't Know Does not Apply			
					6 0 0 0 0 0	P 56b. There are routine opportunities for my child to interact with peers who are non-disabled that are planned and/or facilitated by school personnel.  Always Sometimes Rarely Never Don't Know Does not Apply			
6	0	0				GE 70. Are you familiar with the content of this student's current IEP, including accommodations, supplementary aids and services, and annual goals?			
6	0	0				GE 71. Do you adapt and modify the general education curriculum based on the student's current IEP?			
6	0	0				GE 72. Do you have support from special education personnel to help you modify curriculum, instruction and assessment as required in the student's current IEP?			
6	0	0				GE 73. Are you and the special education personnel working collaboratively to implement this student's program?			
6	0	0				GE 78. Are all the supplementary aids and services necessary for the student's progress in the general education class included in his/her current IEP?			
6	0	0				GE 80. Is the student making progress within the general education curriculum?			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
6	0	0				GE 80a. In your opinion, is this student benefiting from participation in your general education classroom?			
0	0	0				GE 80b. If yes, in what ways?  Has high grades and is doing well. Improving in skills and task completion. Promotes engagement with peers. Being in general education has provided role models. Interaction with peers, engages in conversation. Is academically progressing especially in live lessons from what is learned in general education classroom.			
0	0	6				GE 80c. If no, what does this student need that he/she is not receiving in your class?			
6	0	0				GE 85. Do you have sufficient time to collaborate with the special education teacher in order to meet this student's needs?			
6	0	0				GE 85a. Have you received sufficient training, technical assistance and other support to teach this student?			
0	0	6				GE 85b. If no, what training or support would assist you?			
6	0	0				GE 93. Do special education personnel work directly with you to help you reduce negative student behaviors?			
8	0	1				SE 95. Is this student participating in the general education class and curriculum with students without disabilities to the maximum extent possible?			
6	0	3				SE 95a. In the most recent IEP meeting for this student, did you discuss whether he/she could be educated in a general education classroom for the entire school day?			
4	1	4				SE 95b. In the most recent IEP meeting, did the IEP team recommend removal of this student from the general education classroom for any part of the school day?			
0	0	5				SE 95c. If yes, what reasons were discussed for recommending removal?  Needed additional support for core content. Additional support and service. Needs additional support and service. Academic needs.			
0	0	5				SE 95d. If yes, how was the amount of time that this student would be removed from the general education classroom decided?			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
						Depended on the amount of support and service needed. IEP team and level of support needed for each area. IEP team and level of need for special education. Needs based on RR and functional performance.			
6	0	3				SE 95e. In the most recent IEP meeting, did the IEP team discuss whether this student could be educated satisfactorily in a general education classroom for the entire school day with supplementary aids and services?			
8	0	1				SE 96. Has the student been given the opportunity to participate in non-academic and extracurricular activities with children without disabilities?			
8	0	1				SE 97. Have necessary supports been offered and/or provided to enable that participation?			
9	0	0				SE 99. Are you and related services personnel working together toward meeting the measurable annual goals for this student?			
7	0	2				SE 100. Are you and general education personnel working together toward meeting the measurable annual goals for this student?			
9	0	0				SE 115. Did the IEP team have available information regarding use of the Supplementary Aids and Services ToolKit?			
7	0	2				SE 125. Do you collaborate with general education teachers to identify training needs related to the provision of supplementary aids and services to students with IEPs in the general education classroom?			
						<b>Topical Area 3: Performance Indicators</b>			
		X				5A. <b>FSA-EFFECTIVE USE OF DISPUTE RESOLUTION</b>  <b>Standard:</b> The LEA uses dispute resolution processes for program improvement.			
	N					6. <b>FSA-GRADUATION RATES (SPP)</b>  <b>Standard:</b> The graduation rate of the LEA's students with disabilities is comparable to the state graduation rate.	The LEA will submit an improvement plan to address meeting the SPP target for graduation rates.  Evidence of Change: The LEA will provide SPOC with improvement plan by August 25, 2019.	02/26/2020 LEA IU Representative PaTTAN staff BSE Adviser	

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
	N					7. <b>FSA-DROPOUT RATES (SPP)</b>  <b>Standard:</b> The dropout rate of the LEA's students with disabilities is comparable to the state dropout rate.	The LEA will submit an improvement plan to address meeting the SPP target for dropout rates.  Evidence of Change: The LEA will provide SPOC with improvement plan by August 25, 2019.	02/26/2020 LEA IU Representative PaTTAN staff BSE Adviser	
		X				8A. <b>FSA-SUSPENSION RATES</b>  <b>Standard:</b> The LEA's rate of suspensions and expulsions of students with disabilities is comparable to the rate of other LEAs in the state.			
Y						11. <b>FSA-LEAST RESTRICTIVE ENVIRONMENT (SPP)</b>  <b>Standard:</b> Students with disabilities are provided for in the least restrictive environment			
	N					16. <b>FSA-PARTICIPATION IN PSSA AND PASA (SPP)</b>  <b>Standard:</b> The LEA's population of students who participate in state assessment is comparable with the state data.	The LEA will submit an improvement plan that will address meeting the SPP target for participation in state and local assessments.  Evidence of Change: The LEA will provide SPOC with improvement plan by August 25, 2019.	02/26/2020 LEA IU Representative PaTTAN staff BSE Adviser	
Y						16A. <b>FSA-LOCAL ASSESSMENT</b>			
						<b>Topical Area 4: Evaluation and Reevaluation Process and Content</b>			
						<b>CONSENT AND WAIVER REQUIREMENTS FOR EVALUATION/REEVALUATION</b>			
						<b>PERMISSION TO EVALUATE (File Reviews)</b>			
1	0	9				FR 153. PTE-Consent Form is present in the student file			
1	0	9				FR 154. Demographic data			
1	0	9				FR 155. Reason(s) for referral for evaluation			
1	0	9				FR 156. Proposed types of tests and assessments			
1	0	9				FR 157. Contact person's name and contact information			
1	0	9				FR 158. Parent signature or documentation of reasonable efforts to obtain consent			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
1	0	9				FR 159. Parent has selected a consent option			
						<b>PERMISSION TO REEVALUATE (File Reviews)</b>			
8	1	1			11%	FR 194. PTRE-Consent Form is present in the student file	<p>The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.</p> <p>Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.</p>	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
8	0	2				FR 195. Demographic data			
7	1	2			13%	FR 196. Reason for reevaluation	<p>The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.</p> <p>Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.</p>	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
8	0	2				FR 197. Types of assessment tools, tests and procedures to be used			
4	4	2			50%	FR 198. Contact person's name and contact information	<p>The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.</p> <p>Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.</p>	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
8	0	2				FR 199. Parent has selected a consent option			
8	0	2				FR 200. Parent signature or documentation of reasonable efforts to obtain consent			



Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
						<b>AGREEMENT TO WAIVE REEVALUATION (File Reviews)</b>			
0	0	10				FR 201. Agreement to Waive Reevaluation is present in the student file			
0	0	10				FR 202. Waiver was completed within required timelines (3 years (2 years for any ID student or any student placed in an Approved Private School) from date of ER, prior RR, or Agreement to Waive RR)			
0	0	10				FR 203. Reason reevaluation is not necessary at this time is included			
0	0	10				FR 204. Contact person's name and contact information			
0	0	10				FR 205. Parent has selected a consent option			
0	0	10				FR 206. Parent signature			
						<b>EVALUATION REPORT (INITIAL) (File Reviews)</b>			
1	0	9				FR 160. ER is present in the student file			
1	0	9				FR 161. Evaluation was completed within timelines			
1	0	9				FR 162. A copy of the ER was disseminated to parents at least 10 school days prior to meeting of the IEP team (unless this requirement is waived by parent in writing)			
1	0	9				FR 163. Demographic data			
1	0	9				FR 164. Date report was provided to parent			
1	0	9				FR 165. Reason(s) for referral			
1	0	9				FR 166. Reason(s) for referral reflect the reason(s) listed on the PTE-Consent Form			
1	0	9				FR 167. Evaluations and information provided by the parents of the student (or documentation of LEA's attempts to obtain parent input)			



Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
0	1	9			100%	FR 168. Teacher observations and observations by related service providers, when appropriate	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
0	1	9			100%	FR 169. Recommendations by teachers	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
1	0	9				FR 170. The student's physical condition (including health, vision, hearing); social or cultural background; and adaptive behavior relevant to the student's suspected disability and potential need for special education			
1	0	9				FR 171. Assessments, including when appropriate, current classroom based assessments, aptitude and achievement tests; local and/or state assessments; behavioral assessments; vocational technical education assessment results; interests, preferences, aptitudes (for secondary transition); etc.			
0	0	10				FR 172. If an assessment is not conducted under standard conditions, description of the extent to which it varied from standard conditions (including if the assessment was given in the student's native language or other mode of communication)			
1	0	9				FR 173. Lack of appropriate instruction in reading			
1	0	9				FR 174. Lack of appropriate instruction in math			
1	0	9				FR 175. Limited English proficiency			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
1	0	9				FR 176. Present levels of academic achievement			
1	0	9				FR 177. Present levels of functional performance			
1	0	9				FR 178. Behavioral information			
1	0	9				FR 179. Conclusions			
1	0	9				FR 180. Disability Category			
1	0	9				FR 181. Recommendations for consideration by the IEP team			
1	0	9				FR 182. Evaluation Team Participants documented			
1	0	9				FR 183. For students evaluated for SLD documentation of Agree/Disagree			
1	0	9				FR 184. Documentation that the student does not achieve adequately for age, etc.			
1	0	9				FR 185. Indication of process(es) used to determine eligibility			
1	0	9				FR 186. Instructional strategies used and student-centered data collected			
1	0	9				FR 187. Educationally relevant medical findings, if any			
1	0	9				FR 188. Effects of the student's environment, culture, or economic background			
1	0	9				FR 189. Data demonstrating that regular education instruction was delivered by qualified personnel, including the ESL program, if applicable			
1	0	9				FR 190. Data based documentation of repeated assessments of achievement at reasonable intervals, which was provided to parents			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
0	1	9			100%	FR 191. Observation in the student's learning environment	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
0	0	10				FR 192. Other data if needed			
1	0	9				FR 193. Statement for all 6 items indicated to support conclusions of the evaluation team			
						<b>REEVALUATION REPORT (File Reviews)</b>			
9	0	1				FR 207. RR is present in the student file			
7	2	1			22%	FR 208. Reevaluation was completed within timelines (either 60 calendar days from the date of LEA receipt of signed PTRE-Consent Form, excluding summer break, or within 3 years (2 years for any ID student or any student placed in an Approved Private School) of date of ER, prior RR, or Agreement to Waive RR)	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
9	0	1				FR 209. A copy of the RR was disseminated to parents at least 10 school days prior to the meeting of the IEP team (unless this requirement was waived by a parent in writing)			
9	0	1				FR 210. Demographic data			
9	0	1				FR 211. Date IEP team reviewed existing evaluation data			
9	0	1				FR 212. Physical condition, social, or cultural background and adaptive behavior relevant to the student's need for special education			
9	0	1				FR 213. Evaluations and information provided by the parent (or documentation of LEA's attempts to obtain parent input)			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
9	0	1				FR 214. Aptitude and achievement tests			
9	0	1				FR 215. Current classroom based assessments and local and/or state assessments			
9	0	1				FR 216. Observations by teacher(s) and related service provider(s) when appropriate			
9	0	1				FR 217. Teacher recommendations			
9	0	1				FR 218. Lack of appropriate instruction in reading			
9	0	1				FR 219. Lack of appropriate instruction in math			
9	0	1				FR 220. Limited English proficiency			
9	0	1				FR 221. Conclusion regarding need for additional data is indicated			
1	0	9				FR 222. Reasons additional data are not needed are included			
9	0	1				FR 223. Determination whether the child has a disability and requires special education			
9	0	1				FR 224. Disability category(ies)			
9	0	1				FR 225. Summary of findings includes student's educational strengths and needs			
7	2	1			22%	FR 226. Summary of findings includes present levels of academic achievement and related developmental needs, including transition needs as appropriate	<p>The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.</p> <p>Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.</p>	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
9	0	1				FR 227. Summary of findings includes recommendations for consideration by the IEP team regarding additions or modifications to the student's programs			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
7	1	2			13%	FR 228. Interpretation of additional data	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
0	0	10				FR 229. Documentation that the student does not achieve adequately for age, etc.			
0	0	10				FR 230. Indication of process(es) used to determine eligibility			
0	0	10				FR 231. Instructional strategies used and student-centered data collected			
0	0	10				FR 232. Educationally relevant medical findings, if any			
0	0	10				FR 233. Effects of the student's environment, culture, or economic background			
0	0	10				FR 234. Data demonstrating that regular education instruction was delivered by qualified personnel, including the ESL program, if applicable			
0	0	10				FR 235. Data based documentation of repeated assessments of achievement at reasonable intervals, which was provided to parents			
0	0	10				FR 236. Observation in the student's learning environment			
0	0	10				FR 237. Other data if needed			
0	0	10				FR 238. Statement for all 6 items			
9	0	1				FR 239. Documentation of Evaluation Team Participants			
0	0	10				FR 240. Documentation that team members Agree/Disagree			
						<b>INTERVIEW RESULTS (Parent &amp; Special Education Teacher)</b>			
5	0	0	1			P 24. Have you been asked to provide information for your child's evaluation/reevaluation?			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
5	0	1	0			P 25. Were you given the opportunity to provide this information in writing or in another way that worked for you?			
5	0	1	0			P 26. Was the information you provided to the school for your child's evaluation considered in your child's Evaluation Report?			
4	0	1	1			P 27. If your child was not reevaluated when required (every 2 years for children with intellectual disability (consent retardation), or any child placed in an Approved Private School, and every 3 years for children with other disabilities) did you agree in writing to waive the reevaluation?			
0	5	1	0			P 51. Have you requested an Independent Educational Evaluation (IEE) for your child to be paid for by the school?			
0	0	6	0			P 52. If you have obtained an IEE for your child, were the results of that evaluation considered by the team?			
0	0	6	0			P 53. Were the results of the IEE included in the school's Evaluation Report for your child?			
5	0	4				SE 119. If this student is not making progress, has he/she been reevaluated and/or has the IEP been reviewed?			
						<b>Topical Area 5: IEP Process and Content</b>			
						<b>INVITATION TO PARTICIPATE IN IEP TEAM OR OTHER MEETING (File Reviews)</b>			
10	0	0				FR 241. Invitation is present in the student file			
10	0	0				FR 242. Invitation to Participate in the IEP Meeting was issued prior to the meeting (or documentation that parent signed waiver to move directly to IEP meeting)			
10	0	0				FR 243. Demographic data			
10	0	0				FR 244. Purpose(s) of the meeting			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
4	1	5			20%	FR 245. Transition planning and services – Invitation to parents is checked (age 14, younger if determined appropriate)	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020	
1	1	8			50%	FR 246. Transition planning and services - if appropriate, evidence that a representative of any participating agency was invited to the IEP team meeting with the prior consent of the parent or student	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020	
4	1	5			20%	FR 247. Transition planning and services – Invitation to student is checked (age 14, or younger if determined appropriate)	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020	
10	0	0				FR 248. Invited IEP team members			
10	0	0				FR 249. Date/time/location of meeting			
10	0	0				FR 250. Parent response, or documentation of parent attendance at the meeting, or documentation of multiple efforts to encourage participation			
						<b>PARENT CONSENT TO EXCUSE MEMBERS FROM ATTENDING IEP TEAM MEETING (File Reviews)</b>			
0	0	10				FR 251. Parent Consent to Excuse Members from Attending the IEP Team Meeting is present in the student file			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
0	0	10				FR 252. Demographic data			
0	0	10				FR 253. Form designates required IEP team member(s) for whom attendance is not necessary			
0	0	10				FR 254. Form designates which members will submit written input prior to the meeting			
0	0	10				FR 255. Parent written consent is documented			
						FR 256. The team members excused: a. General Education Teacher b. Special Education Teacher c. Local Education Agency Representative			
					0 0 0				
						<b>IEP CONTENT (File Reviews)</b>			
9	1	0			10%	FR 257. IEP is present in the student file	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
9	0	1				FR 258. IEP was completed within timelines			
9	0	1				FR 259. Demographic data			
9	0	1				FR 260. IEP implementation date			
9	0	1				FR 261. Anticipated duration of services and programs			
4	0	6				FR 262. If appropriate, LEA and parent agreement to make changes to IEP without convening an IEP meeting			
						<b>DOCUMENTATION OF IEP TEAM PARTICIPATION (File Reviews)</b>			
9	0	1				FR 263. Parents			



Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
3	1	6			25%	FR 264. Student	<p>The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.</p> <p>Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.</p>	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
8	1	1			11%	FR 265. General Education Teacher	<p>The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.</p> <p>Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.</p>	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
9	0	1				FR 266. Special Education Teacher			
9	0	1				FR 267. Local Education Agency Representative			
0	0	10				FR 270. Community Agency Representative			
0	0	10				FR 271. Teacher of the Gifted			
0	0	10				FR 272. Written input provided by IEP team member(s) excused from participating in the IEP meeting if the invitation stated they were to provide written input			
6	3	1			33%	FR 273. Copy of Procedural Safeguards Notice was given to parent during the school year	<p>The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.</p> <p>Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.</p>	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
						<b>SPECIAL CONSIDERATIONS (File Reviews)</b>			
0	1	9			100%	FR 274. If the student is blind or visually impaired, a description of the instruction in Braille and the use of Braille, unless the IEP team determines that such instruction is not appropriate	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
0	0	10				FR 275. If the student is deaf or hard of hearing, a communication plan			
4	0	6				FR 276. If the student has communication needs, needs must be addressed in the IEP			
1	0	9				FR 277. If the student requires assistive technology devices and/or services, needs must be addressed in the IEP			
0	0	10				FR 278. If the student has limited English proficiency, the IEP team must consider English as Second Language for provision of FAPE			
3	0	7				FR 279. If the student has behaviors that impede his/her learning or that of others, the IEP includes a Positive Behavior Support Plan based on a functional assessment of behavior utilizing positive behavior techniques			
1	0	9				FR 280. If the student has other special considerations, these are addressed in the IEP			
						<b>PRESENT LEVELS OF ACADEMIC ACHIEVEMENT AND FUNCTIONAL PERFORMANCE (File Reviews)</b>			
9	0	1				FR 281. Student's present levels of academic achievement			
8	1	1			11%	FR 282. Student's present levels of functional performance	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
2	3	5			60%	FR 283. Present levels related to current postsecondary transition goals (if student is 14, or younger if determined by IEP team)	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
8	0	2				FR 284. Parental concerns for enhancing the education of the student (if provided by parent to the LEA)			
9	0	1				FR 285. How the student's disability affects involvement and progress in the general education curriculum			
9	0	1				FR 286. Strengths			
8	1	1			11%	FR 287. Academic, developmental, and functional needs related to student's disability	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
						<b>TRANSITION SERVICES (File Reviews)</b>			
1	4	5			80%	FR 289. Evidence that the measurable postsecondary goal(s) were based on age appropriate transition assessment	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
2	3	5			60%	FR 290. An appropriate measurable postsecondary goal or goals that covers education or training, employment, and, as needed, independent living	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
2	2	6			50%	FR 291. Evidence that the postsecondary goal or goals that covers education or training, employment, and, as needed, independent living are updated annually	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
2	2	6			50%	FR 292. Location, Frequency, Projected Beginning Date, Anticipated Duration, and Person(s)/Agency Responsible for Activity/Service	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
2	3	5			60%	FR 292a. Transition services include courses of study that will reasonably enable the student to meet his/her postsecondary goal(s)	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
2	3	5			60%	FR 292b. Transition services in the IEP that will reasonably enable the student to meet his/her postsecondary goal(s)	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
2	3	5			60%	FR 292c. Annual goals are related to the student's transition services	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
						<b>PARTICIPATION IN STATE AND LOCAL ASSESSMENTS (File Review)</b>			
7	0	3				FR 293. Documentation of IEP team decision regarding participation in statewide assessments (PSSA/Keystone Exams, ACCESS for ELLS, Alternate ACCESS for ELLS or PASA)			
5	0	5				FR 294. If the student will participate in the PSSA, documentation of IEP team decision regarding participation with or without accommodations			
4	0	6				FR 295. If the student will participate in the PASA, an explanation of why the student cannot participate in the PSSA/Keystone Exams			
4	0	6				FR 296. If the student will participate in the PASA, explanation of why PASA is appropriate			
4	0	6				FR 297. If the student will participate in the PASA, how student's performance will be documented (videotape or written narrative)			
9	0	1				FR 298. Indication of IEP team decision regarding participation in local assessments (local or alternate local)			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
8	0	2				FR 299. If the student will participate in local assessments, indication of IEP team decision regarding participation with or without accommodations			
4	0	6				FR 300. If the IEP indicates the student will participate in an alternate local assessment, explanation of why the student cannot participate in the regular assessment			
4	0	6				FR 301. If the student will participate in an alternate local assessment, explanation of why the alternate assessment is appropriate			
						<b>ANNUAL GOALS AND OBJECTIVES (INCLUDING ACADEMIC AND FUNCTIONAL GOALS) (File Reviews)</b>			
6	3	1			33%	FR 302. Measurable Annual Goals	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
9	0	1				FR 303. Description of how student progress toward meeting goals will be measured			
9	0	1				FR 304. Description of when periodic reports on progress will be provided to parents			
8	1	1			11%	FR 305. Documentation of progress reporting on Annual Goals	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
7	0	3				FR 306. Short Term Objectives			
						<b>SPECIAL EDUCATION/RELATED SERVICES/SUPPLEMENTARY AIDS AND SERVICES/PROGRAMS MODIFICATIONS (File Reviews)</b>			



Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
9	0	1				FR 307. Program Modifications and Specially-Designed Instruction			
8	0	2				FR 308. If the student's most recent Evaluation Report contained recommendations for modifications and accommodations, did the IEP team address those recommendations in development of this IEP			
9	0	1				FR 309. If Program Modifications and Specially Designed Instruction are included on the IEP, the location, frequency, projected beginning date and anticipated duration of services			
0	0	10				FR 310. If a student attends a Career or Vocational Technical School, evidence that the specially designed instruction addresses the student's needs in Career and Vocational Technical School			
7	1	2			13%	FR 311. If Related Services are included on the IEP, the location, frequency, projected beginning date and anticipated duration of services	<p>The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.</p> <p>Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.</p>	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
7	0	3				FR 312. If the student's most recent Evaluation Report contained recommendations for the provision of related services, including psychological counseling, did the IEP team address those recommendations in development of this IEP			
7	2	1			22%	FR 313. If Supports for school personnel are included on the IEP, the personnel to receive support, support, location, frequency, projected beginning date and anticipated duration of services	<p>The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.</p> <p>Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.</p>	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
7	0	3				FR 314. If the student's most recent Evaluation Report contained recommendations for program modifications or supports for school personnel provided for the student, did the IEP team address those recommendations in development of this IEP			
0	0	10				FR 315. Support services, if the student is identified as gifted and also is identified as a student with a disability			
8	1	1			11%	FR 316. A conclusion regarding student eligibility for ESY	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
5	3	2			38%	FR 317. Information or data reviewed by the IEP team to support the ESY eligibility determination	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
6	0	4				FR 318. Where ESY services were deemed appropriate, annual goals and when appropriate, short term objectives that are to be addressed in the child's ESY program			
4	2	4			33%	FR 319. Where ESY was determined to be appropriate, ESY service to be provided, location, frequency, projected beginning date and anticipated duration of services	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
						<b>EDUCATIONAL PLACEMENT (File Reviews)</b>			



Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
9	0	1				FR 320. Explanation of the extent, if any, to which the student will not participate with students without disabilities in the regular education class			
9	0	1				FR 321. Explanation of the extent, if any, to which the student will not participate with students without disabilities in the general education curriculum			
9	0	1				FR 322. Type of support, by amount (itinerant, supplemental, full-time)			
9	0	1				FR 323. Type of special education supports, e.g. autistic support, emotional support, learning support, etc.			
9	0	1				FR 324. Location of student's program (name of LEA where the IEP will be implemented)			
9	0	1				FR 325. Location of student's program (name of School Building where the IEP will be implemented)			
5	0	5				FR 326. If child will not be attending his/her neighborhood school, reason why not			
						<b>PENNDATA REPORTING FOR EDUCATIONAL ENVIRONMENT (File Reviews)</b>			
8	1	1			11%	FR 327. Completed Section A or Section B	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 Intermediate Unit Representatives PDE resources Charter School staff PaTTAN resources and staff	
						<b>IEP DEVELOPMENT</b>			
						<b>INTERVIEW RESULTS (Parent &amp; General Education Teacher)</b>			
5	0	0	1			P 28. Were you invited to participate in your child's most recent IEP team meeting?			
5	1	0	0			P 29. Did you participate in developing the current IEP for your child?			
5	0	1	0			P 30. Was the meeting held at a time and location that was convenient for you?			
2	0	4	0			P 31. If you were unable to participate in person, did the school offer other arrangements for you to participate by phone or through other methods?			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
5	0	0	1			P 32. Was the input you provided considered in the development of your child's current IEP?			
3	0	2	1			P 32a. Have you received sufficient training, technical assistance and other support to participate as an IEP team member?			
0	0	6	0			P 32b. If no, what training or support would assist you?			
5	0	0	1			P 33. Were the services you requested for your child considered by the IEP team in the development of your child's current IEP?			
5	0	0	1			P 35. Was the current IEP developed at the IEP meeting?			
5	0	0	1			P 36. If there was a draft IEP developed prior to the IEP meeting were you provided a copy of the draft either before or at the meeting?			
5	0	0	1			P 37. Were the special education teacher, the general education teacher and the school representative at the IEP meeting?			
0	0	6	0			P 38. If required IEP team members (special education teacher, general education teacher, or LEA) did not attend the meeting, did you agree in writing to them not being there?			
0	0	6	0			P 39. Was written input from the excused IEP team member(s) available to you before the meeting?			
		5	0		1	P 65. If you did not participate in your child's IEP meeting, what kept you from participating? g. other No one told me about a meeting.			
3	0	3				GE 74. Did you attend the most recent IEP meeting for this student or have the opportunity to provide input?			
3	0	3				GE 75. Did you recommend any needed supports to implement the current IEP for this student?			
3	0	3				GE 76. Were those recommendations considered by the IEP team?			
6	0	0				GE 86. When a student with a disability is included in your class do you have the opportunity to provide information to the IEP team?			
5	0	1				GE 87. Do you provide progress monitoring data as part of the IEP development process?			
						<b>IEP CONTENT</b>			
						<b>INTERVIEW RESULTS (Parent, General &amp; Special Education Teacher)</b>			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
5	0	0	1			P 40. Did the IEP team consider the recommendations that were made in your child's most recent evaluation, including all recommendations that were made by the evaluation team for special education, related services, and supports for school personnel?			
4	1	0	1			P 41. Did the IEP team accept or reject the evaluation team's recommendations for special education, related services, and supports for school personnel for appropriate educational reasons.			
6	0	0				GE 81. Are this student's goals based on the PA Standards/PA Common Core or, if appropriate, alternate standards?			
6	0	0				GE 82. Is the specially designed instruction in this student's current IEP appropriate to meet his/her educational needs?			
6	0	0				GE 83. Is the current IEP appropriate to meet this student's educational needs?			
9	0	0				SE 98. Unless otherwise specified in the student's IEP, is the length of this student's instructional day the same as nondisabled students?			
9	0	0				SE 102. Is the specially-designed instruction in the current IEP appropriate to meet this student's educational needs?			
9	0	0				SE 103. Are the student's annual goals based on the PA Standards/PA Common Core or, if appropriate, alternate standards?			
8	0	1				SE 104. If appropriate, are the student's annual goals based on functional performance?			
8	0	1				SE 106. If the student's most recent Evaluation Report contained recommendations for modifications and accommodations did the IEP team address those recommendations in development of the student's current IEP and accept or reject the ER recommendations for appropriate educational reasons?			
8	0	1				SE 107. If the student's most recent Evaluation Report contained recommendations for provision of related services, including psychological counseling, did the IEP team address those recommendations in development of the student's current IEP and accept or reject the ER recommendations for appropriate educational reasons?			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
9	0	0				SE 108. If the student's most recent Evaluation Report contained recommendations for program modifications or supports for school personnel that will be provided for the student, did the IEP team address those recommendations in development of the student's current IEP and accept or reject the ER recommendations for appropriate educational reasons?			
9	0	0				SE 112. Was it an IEP team decision as to whether this student would participate in the PSSA/Keystone Exams, PASA, and other district-wide/charter school-wide assessments?			
9	0	0				SE 117. Is this student making progress in meeting the annual goals of his/her current IEP?			
6	0	3				SE 117a. In your opinion, is this student benefiting from participation in the general education classroom?			
0	0	3				SE 117b. If yes, in what ways?  Is working on career goals and with additional course selections, can work with peers. Works well with classmates and models others. Socialization, peer support, differentiated instruction. Doing well, getting all As and Bs. Working on content due to differentiation, also seems to enjoy peer support. Working on IEP goals and doing well.			
0	0	9				SE 117c. If no, what does this student need that he/she is not receiving?			
9	0	0				SE 118. Is the progress on annual goals recorded and reported to the parent based on objective and measurable data?			
						<b>IEP IMPLEMENTATION</b>			
						<b>INTERVIEW RESULTS (Parent, General &amp; Special Education Teacher)</b>			
5	0	0	1			P 48. Were the special education and related services in your child's current IEP provided within 10 school days of the completion of the IEP?			
5	0	0	1			P 49. Are the special education and related services included in your child's current IEP provided at no cost to you?			
						P 57. When all students in the school receive a report card, I also receive a progress report on my child's IEP goals.			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
					5 0 0 0 1 0	Always Sometimes Rarely Never Don't Know Does not Apply			
					5 0 0 0 1 0	P 58. My child's progress is reported to me by the school in a manner that I understand. Always Sometimes Rarely Never Don't Know Does not Apply			
5	0	0	1			P 64. My child is receiving the supports and services agreed upon at the IEP meeting.			
6	0	0				GE 77. If supports for school personnel are included in the student's current IEP, has the LEA provided those supports?			
6	0	0				GE 79. Are the supplementary aids and services, including program modifications and specially designed instruction in the student's current IEP, being provided?			
3	0	3				GE 79a. In the most recent IEP meeting for this student, did you discuss whether the student could be educated in a general education classroom for the entire school day?			
3	0	3				GE 79b. In the most recent IEP meeting, did the IEP team recommend removal of this student from the general education classroom for any part of the school day?			
0	0	3				GE 79c. If yes, what reasons were discussed for recommending removal? Curriculum modifications and slower pace. Needed the support. Requires additional support and services.			
0	0	3				GE 79d. If yes, how was the amount of time that this student would be removed from the general education classroom decided? IEP team dependent upon amount of services needed. Based on needs. Collaboratively decided as a team with general education, special education, and parents.			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
3	0	3				GE 79e. In the most recent IEP meeting, did the IEP team discuss whether this student could be educated satisfactorily in a general education classroom for the entire school day with supplementary aids and services?			
5	0	1				GE 84. If appropriate, are you implementing the positive behavior support plan for this student as written in the current IEP			
5	0	1				GE 92. If a student with an IEP is having behavioral difficulties in your classroom, do you address the behavior in your classroom rather than sending him/her back to the special education classroom to address the behavior issue unless indicated otherwise in the student's IEP?			
9	0	0				SE 105. Are the supplementary aids and services, including program modifications and specially designed instruction in the student's current IEP, being provided?			
9	0	0				SE 109. Is this student receiving the type and amount of special education instruction and related services specified in his/her current IEP?			
9	0	0				SE 110. Was this student's current IEP implemented no later than 10 school days after its completion or no later than the IEP implementation date?			
9	0	0				SE 111. If supports for school personnel are included in this student's current IEP, has the LEA provided those supports?			
9	0	0				SE 113. If required, were the testing accommodations included in this student's current IEP implemented?			
9	0	0				SE 114. Was the placement decision made by the IEP team after the annual goals, specially designed instruction, and related services were developed?			
9	0	0				SE 120. Is this student receiving the supports and services agreed upon in his/her current IEP, including related services?			
						<b>PROVISION OF ESY AND RELATED SERVICES INTERVIEW RESULTS (Parent &amp; Special Education Teacher)</b>			
3	0	2	1			P 42. If your child's current IEP includes psychological counseling as a related service, and he/she receives these services, including transportation, are they provided at no cost to you?			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
5	0	0	1			P 43. Was your child's need for extended school year (ESY) – which means services over the summer or during breaks from the regular school calendar - discussed at an IEP meeting?			
5	0	0	1			P 44. Did you receive an explanation of what would make your child eligible for ESY services?			
5	0	0	1			P 45. Did you agree with the IEP team's conclusion about your child's eligibility for ESY services?			
0	0	6	0			P 46. If you did not agree with the decision on ESY eligibility, were you given a written notice (NOREP/PWN) explaining that you could ask for a due process hearing?			
5	0	0	1			P 47. If your child was determined to be eligible for ESY services, did the IEP team decide upon the goals and services needed for the ESY program?			
9	0	0				SE 121. Was the consideration of ESY eligibility discussed during this student's current IEP meeting?			
8	0	1				SE 122. If this student was determined to be ESY eligible, did the IEP team determine what goals and services were needed and include them in the IEP?			
0	1	8				SE 122a. At the most recent IEP meeting, did the IEP team discuss the development of a plan to transition this student back into the school district (or charter school if student is enrolled in a charter school) with supplementary aids and services?			
0	1	8				SE 122b. Are staff from the home district (or charter school if student is enrolled in a charter school) involved with the planning and implementation of this student program?			
1	0	8				SE 122c. Does this student go on field trips, attend school functions or participate in extracurricular activities with his/her same age/grade peers who are non-disabled?			
1	0	8				SE 122d. Does this student need supplementary aids and services to participate in non-academic and/or extra-curricular activities?			
1	0	8				SE 122e. If yes, are needed supplementary aids and services being provided to this student?			
1	0	8				SE 122f. Are there routine opportunities for this student to interact with non-disabled peers that are planned and/or facilitated by school personnel?			



Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
						SECONDARY TRANSITION (Parent & Special Education Teacher)			
3	0	3	0			P 50. If your child is age 14 or older was he/she invited to participate in the IEP meeting for transition planning?			
3	0	2	1			P 50a. In the most recent IEP meeting for your child, did you discuss whether your child could be educated in a general education classroom for the entire school day?			
0	2	3	1			P 50b. In the most recent IEP meeting, did the IEP team recommend removal of your child from the general education classroom for any part of the school day?			
0	0	6	0			P 50c. If yes, what reasons were discussed for recommending removal?			
0	0	6	0			P 50d. If yes, how was the amount of time that your child would be removed from the general education classroom decided?			
3	0	2	1			P 50e. In the most recent IEP meeting, did the IEP team discuss whether your child could be educated satisfactorily in a general education classroom for the entire school day with supplementary aids and services?			
3	0	2	1			P 50f. In your opinion, is your child benefiting from participation in the general education classroom?			
0	0	3	0			P 50g. If yes, in what ways?  Doesn't feel isolated. Getting specialized instruction, has improved tremendously. Able to interact with peers and focus attention.			
0	0	6	0			P 50h. If no, what does your child need that he/she is not receiving in the class?			
						P 59. I am satisfied with the transition services developed for my child.  2 Always 0 Sometimes 0 Rarely 0 Never 1 Don't Know 3 Does not Apply			
						P 60. My child is learning skills that will lead to a high school diploma and further education and/or employment.			



Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
					5 0 0 0 1 0	Always Sometimes Rarely Never Don't Know Does not Apply			
4	0	5				SE 116. Were this student's desired post school outcomes considered when the IEP team developed the annual goals?			
7	0	2				SE 123. Where appropriate, does the LEA invite a representative of a participating agency that is likely to be responsible for providing or paying for transition services to the IEP meeting?			
						<b>Topical Area 6: NOREP/PWN</b>			
						<b>(File Reviews)</b>			
10	0	0				FR 328. NOREP/PWN is present in the student file			
10	0	0				FR 329. Demographic data			
10	0	0				FR 330. Type of action taken			
10	0	0				FR 331. A description of the action proposed or refused by the LEA			
10	0	0				FR 332. An explanation of why the LEA proposed or refused to take the action			
9	1	0			10%	FR 333. A description of the other options the IEP team considered and the reason why those options were rejected	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 LEA IU Representative PaTTAN BSE Adviser	
10	0	0				FR 334. Description of each evaluation procedure, assessment, record or report used as the basis for proposed action or action refused			
7	0	3				FR 335. Description of other factor(s) relevant to LEA's proposal or refusal			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
10	0	0				FR 336. Educational placement recommended (including amount and type)			
10	0	0				FR 337. Signature of school district superintendent or charter school CEO or designee			
6	4	0			40%	FR 338. Parent signature or documentation of reasonable efforts to obtain consent (e.g. mailed to parents, certified mail, visit to the parent's home, etc.)	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 LEA IU Representative PaTTAN BSE Adviser	
6	3	1			33%	FR 339. Parent has selected a consent option	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 LEA IU Representative PaTTAN BSE Adviser	
9	1	0			10%	FR 340. NOREP/PWN reflects the educational placement indicated on the student's IEP	The LEA will conduct professional development workshops for special education staff that focuses on writing special education documentation that is accurate and regulatory.  Evidence of Change: The LEA will submit participant sign-in sheets and training agendas/hand-outs to the BSE adviser. BSE adviser will conduct a review of files to verify compliance.	02/26/2020 LEA IU Representative PaTTAN BSE Adviser	
						<b>INTERVIEW RESULTS (Parent)</b>			
0	0	5	1			P 34. If services that you requested for your child were rejected by the school, did you receive a written notice (NOREP/PWN) explaining why the request was rejected?			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
					5 0 0 0 1 0	P 61. If I don't understand my child's educational rights, and I inquire about them, someone from the school takes the time to explain them to me.  Always Sometimes Rarely Never Don't Know Does not Apply			
						<b>Topical Area 7: Additional Interview Responses</b>			
						<b>INTERVIEW RESULTS (Parent &amp; Special Education Teacher)</b>			
					6 0 0 0 0 0	P 54. I am a partner with school personnel when we plan my child's education program.  Always Sometimes Rarely Never Don't Know Does not Apply			
		0	0		3 1 1 2 3 1 4	P 66. Tell me anything you really like about your child's special education program.  a. modifications c. staff-aide ratios d. staff's knowledge, training e. instructional materials i. support services k. staff's understanding and attitude n. other Works at own pace. Sessions are very helpful and they really take the time to work with my child. The program has helped drastically. Individualized instruction.			
		4	1		1	P 67. Tell me anything you would like to change about the program.  c. staff-aide ratios			
		0	0		3 2 1	P 68. The school explains what options parents have if the parent disagrees with a decision of the school.  a. Very strongly agree c. Agree d. Disagree			
						P 69. Additional comments about your child's program.			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
						Is doing so well. I am irritated about a lot of things.			
9	0	0				SE 101. Do you hold the required certification to implement this student's program?			
8	0	1				SE 101a. Have you received sufficient training, technical assistance and other support to teach this student?			
0	0	9				SE 101b. If no, what training or support would assist you?			
						<b>Topical Area 8: Other Non-compliance Issues</b>			
						<b>Topical Area 9: Other Improvement Plan Issues</b>			
						FSA 15A Parent Survey Results	The LEA will submit an improvement plan to address parent trainings/information sessions.  Evidence of Change: The LEA will submit the improvement plan to SPOC by August 25, 2019.	08/25/2019  LEA IU Representative PaTTAN staff BSE Adviser	

## Annual IEP Process

1. **Schedule IEP meeting:** At least 45 days out -- call or email parent
  - a. Choose an available day and time on the IEP Coordinator's Google calendar.
  - b. Use the following format for naming the calendar event: Student first name last initial and type of meeting/your last name/location of meeting or zoom or phone conference information (example: Kelsey M. Annual IEP/ Morrow/ Zoom:<https://palcsccommunity.zoom.us/j/3669557919>.) Invite LEA and general education teacher.
  - c. If IEP Coordinator is booked, pick a different day or time. If not possible, schedule meeting with next available LEA (Supervisor of Special Education, then IEP Compliance Monitor). At least three contact attempts have to be made to schedule with the parent. Document these in PowerSchool.
  - d. Once three attempts have been made but still no contact, pick a day and time for the meeting and mail and certify mail home invite to parent.
  - e. If parent does not attend meeting, document this in "Other Information" section on cover of IEP, along with contact attempts.
  - f. Create IEP Signature Retrieval/Checklist document for student
  
2. **Send home Invite and Other Documents:** Right after you schedule the IEP meeting, but at least 10 days before IEP meeting
  - a. Email or mail (whatever parent prefers) invite, Procedural Safeguards, and parent input survey
  - b. If student is/will be transition age, send parent and student transition surveys and OVR Early Reach information
  - c. Invite all related service providers to the IEP meeting
  
3. **Request teacher and related services input:** At least 14 days before meeting
  - a. Make your own copy of the teacher input form for each student you are requesting input for
  - b. Input is to be completed by general education teachers within 3 days. Include student's name and date due on each form. If input is not provided within 3 days, email a second request and CC the teacher's principal.
  - c. Request input from related service providers (information on sessions, attendance, strengths, and needs, as well as goal updates)

- 4. Draft emailed to Compliance Monitor: 7 days before IEP meeting**
  - a. Email Compliance Monitor to alert that draft is ready to review in PS.
  - b. Use the following subject line: Student first name Last Initial IEP Review
  - c. Include student full name, grade, disability category, IEP meeting date, date that draft goes home to parents, and most recent ER/RR date in the body of the email.
  
- 5. Compliance Monitor sends feedback via email (with IEP Coordinator cc'ed):**
  - a. Make suggested changes from Review IEP Spreadsheet
  - b. If you have questions on the review, schedule a time to meet with the Compliance Monitor, or email the Compliance Monitor to ask her to review questions
  
- 6. Draft emailed to parents and IEP Coordinator/LEA: At least 48 hours prior to meeting**
  - a. Email draft with Compliance Monitor corrections completed
  - b. IEP draft needs to have "Draft" watermark on it--just download from PS without changing status
  - c. IEP Coordinator and/or LEA is copied so that they can review IEP
  
- 7. Hold meeting with IEP team**
  
- 8. Following Meeting**
  - a. Make any changes/additions to the IEP based on team meeting discussions and/or any notes from the LEA on the IEP Review sheet
  - b. Create NOREP in PowerSchool
  - c. Email Supervisor that IEP is ready to finalize and send home in PS - add PIMS updates (i.e. give her IEP date, disability category(ies), type of support: learning support, etc., level of support: itinerant or supplemental, and % of time spent in general education)
  - d. Alert Related Services Coordinator of any new related services that need to be matched
  - e. Change IEP and NOREP to "final" status in PS (from "draft status" so that watermark disappears). For newly identified students, the IEP cannot be finalized or implemented until PALCS receives the signed NOREP back from the parent.
  - f. Email/mail paperwork in "final" status to parents (within 2-3 days following IEP meeting) and any current related service providers - use DocuSign

- g. Copy Jennifer Hughes as a recipient of the IEP in DocuSign to cover billing pages requirement (see DocuSign process for more explanation)
- h. Update compliance dates on your Compliance Tracker sheet
- i. Discuss any major SDI changes, etc. with general education teachers

## **9. Obtaining Signatures**

- a. Send to parent three times: via email (whole doc), via email (or mail if requested), then via certified mail (just signature pages with directions for signing and returning). If using DocuSign, you only need to send the documents once, then DocuSign will automatically continue sending until the documents are signed.
- b. As documents are sent, track on the IEP Signature Retrieval/Checklist

## **10. Uploading Paperwork**

- a. Upload the signed IEP, NOREP, and invite (and any other documents) with signatures in PowerSchool (attach it to the doc--open the doc: Navigate to-->File Attachments-->Attach Files)


## **~~11. Filing Paperwork~~**

- ~~a. File paperwork in the binder room if you are located in West Chester within 30 days of the IEP meeting~~
- ~~b. If you are located in Pittsburgh, email documents to Administrative Assistant to file within 30 days of the IEP meeting~~
- ~~c. Need to file all pertinent docs: IEP, NOREP, invite, PTR, RR, PBSP, etc. as required with signatures (at least teacher signatures, can file without parent signatures if you are not going to receive them)~~
- ~~d. Send/file IEP Signature Retrieval/Checklist to file with other docs~~



# Extended School Year

2021-22





# ESY - What it is

- Five-week summer academics and/or related services aimed at student goal areas that ensures the provision of FAPE to students. It helps to prevent loss of skills / issues with recouping skills over summer break.
- Determination is based on the following factors:
  - Regression**
  - Recoupment**
  - Severity of Disability
  - Mastery/Consolidation of a skill
  - Self-sufficiency and independence
  - Successive Interruptions/Withdrawal

# ESY - What it isn't

- Daycare

- Summer recreation

- Services provided that would be considered 'helpful' or educationally beneficial by the teacher, parent, or other team member.

# Types of ESY

ESY Teachers provide instruction on goals in the following areas:

- Reading
- Writing
- Math
- Executive Functioning

\*\*ESY teachers will not be monitoring behavior goals, coping skills, task completion, etc.\*\*

Related Services Providers:

-Speech, OT, PT, Counseling, etc.

\*\*Students will not necessarily have the related service at the same frequency /duration that they have during the school year. Ask the related service providers for recommendations for frequency/duration after explaining the shorter nature of the ESY program.\*\*\*

# What is the Armstrong Group?

## Armstrong Group

The timing of an Extended School Year determination is dependent on whether the student is a member of the Armstrong group, as defined by the Armstrong Remedial Order No. 2 Guidelines. Students in the Armstrong group are those students with a **severe disability**, such as:

- Autism/pervasive developmental disorder.
- Serious emotional disturbance.
- Severe intellectual disability (mental retardation).
- Degenerative impairments with mental involvement.
- Severe multiple disabilities.

**\*\*Students in the Armstrong Group do not automatically qualify for ESY. You will still need to fill out the ESY checklist and make the determination using data. \*\***

# IEP Determination Checklists

- **Armstrong Group:**
  - Send to administration by 2/1/22
  - Administration send checklists back to teachers by 2/18/22
  - Determinations communicated to parents by 2/25/22
  - Revised IEP and ESY NOREPs sent to parent by 3/30/22

# IEP Determination Checklists

## Non-Armstrong Group:

- Send to administration by 3/1/22
- Administration send checklists back to teachers by 3/21/22
- Determinations communicated to parents by 3/28/22
- Revised IEP and ESY NOREPs sent to parent by 4/29/22



# Tutoring During ESY

-Students will NOT qualify for Tutoring for Organization/Task Completion or Academic Remediation.

-Exceptions can apply if the student will be in summer school and receiving a grade for the course - however, this will be on a case-by-case basis and needs to be carefully considered. You must get the approval of an administrator before adding this service.

-If a student does qualify, tutoring hours will be reduced over the summer (i.e. students should not have 10 hours of tutoring over the summer).

# Related Services ESY Form

<https://docs.google.com/document/d/14hdabcJgRhiQ7FzG2II2uYZEfRanArewWfF5T6gFKPU/edit#>

- Shannon is sending the above form to the related service providers
- The related services providers will send the completed forms to the case manager



# Additional ESY Resources

-[ESY: Teacher Reference Sheet \(PATTAN\)](#)

-[ESY in PA \(PATTAN\)](#)



Questions?

Date: September 21, 2021

Link: <https://PALCScommunity.zoom.us/j/4542136704>

## Agenda

Deb / Michele

1. Compliance dates for newly enrolled students
2. Deb - out Thursday

Victoria

1. Adding county/demographic information
  - a. Hover over "Demographics" in upper left, then click "Guardians." From there, hit the edit icon on the far right (it looks like a paper and pencil), then hit edit at the very bottom, and you will see the option to edit parent info, including county. Save that, and as long as the parent is checked as "displays on IEP" then the county should update
2. Checking "no" for transition goals
  - a. On the far right of the transition grid screen, you will see the words "Edit/Delete."
  - b. Hover your mouse slightly above the word "Edit," and click.
  - c. Once you hit edit, you can check "no" for Measurable Annual Goal (which will check the box on the IEP draft that says no) and write a blurb in the box for any goal areas that you don't need a goal for. Please then save your work, and you should be good to go!
3. Please leave Placement/LRE blank until after meeting - once you edit it, you can't delete it!
4. Reminder for ESY:
  - a. **New Enrollees**: check "no," do not fill out checklist, and use blurb:

"Due to STUDENT'S recent enrollment date, PALCS does not have sufficient data to determine regression/recoupment issues following breaks in programming at this time. Therefore, STUDENT does not qualify for ESY as of DATE OF MEETING; however, ESY will be revisited when more data has been collected and a final determination will be made by EITHER FEBRUARY 28 OR MARCH 31 (DEPENDING ON ARMSTRONG OR NOT)."

- b. Newly Qualified: check "no," do not fill out checklist, and use blurb: "This is STUDENT'S initial IEP; therefore, PALCS does not have sufficient data to make a determination for ESY for the 2021-22 school year. The IEP team will monitor STUDENT'S progress toward HIS/HER goals, as well as any issues with regression/recoupment, and a final ESY determination will be made by EITHER FEBRUARY 28 OR MARCH 31 (DEPENDING ON ARMSTRONG OR NOT)."

Ashley

- Scheduling meetings
- Meetings with RSP Changes

April

Stephanie

#### General Questions:

1. Great job team -- we raised enough money to sponsor 2 kids on the Diversibility Swim Squad!
2. How will we schedule Kelley as our LEA - Do we go through Ashley or can we add a meeting to her calendar if she does not already have two for that day?
3. Can we have a training on how to do progress reports in IEP writer soon, before progress report season arrives.
4. Can you please explain the process of making an IEP goal "mastered"? An IEP goal is considered mastered when it is proficient for how long?

**5. In IEP Writer, can we edit student Demographics (disability/county of residence)?**

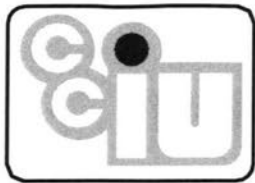
Date: October 14, 2021

Link: <https://PALCScommunity.zoom.us/j/4542136704>

### Agenda

1. How to access the Progress Monitoring module in IEPWriter.
2. How to enter data collected on goals
3. Process for students who do not have IEPs developed in IEPWriter
4. Walk through of how to develop a progress report in IEPWriter
5. Questions





An educational service agency

# Chester County Intermediate Unit

## Memorandum of Understanding

### 2021-2022 Chester County Intermediate Unit Title III Consortium

The Chester County Intermediate Unit will serve as the fiscal agent for members of the Chester County Title III Consortium. The purpose of the consortium is to receive a Title III subgrant, meeting all Title III requirements. As the fiscal agent, The CCIU will be responsible for filing the required application, expenditure reports and maintain financial records.

#### Program Support and Development

In its role as the lead LEA, the CCIU will support the development of Title III related programs, services and resources as follows:

- Provide technical assistance to Consortium LEAs through consult and training.
- Provide professional development workshops and trainings regarding effective English Learner instructional practices to Consortium classrooms teachers, principals, administrators and/or other school personnel based on collectively targeted needs and requests.
- Provide specific and targeted professional development and/or coaching to staff offered by a local consultant in an equitable and cost-effective manner to participating LEAs.

#### Performance Goals

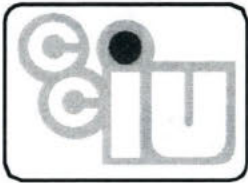
Under this Memorandum of Understanding, it is the responsibility of each LEA to meet Performance Goals and to maintain the appropriate documentation related to each goal at the local level as defined within the CCIU Title III Grant. The following goals have been identified for the 2021-2022 school year:

1. Increase the number of resources provided for parents and families by creating a repository for schools, LEA's, and community service organizations to access.
2. Increase the number of professional development opportunities that focus on culturally responsive teaching from two to four.
3. 50% of all ELs will demonstrate gains in language proficiency by increasing at least one proficiency level based on the composite score on the WIDA ACCESS for ELs assessment.
4. Increase attendance of Nonpublic school professionals in English learner professional learning opportunities by 50%.

#### Parent Notification

- Under this Memorandum of Understanding, the responsibility for providing notification to parents/guardians of English Learners is delegated to the individual LEA participating in the consortium.





# Chester County Intermediate Unit

## Allowable Use of Title III Funds and Compliance

- Signature by LEA authorized representative on this MOU is assurance that the LEA has a compliant Core English Language Development (ELD) budget derived from local district funds.
- The Title III budget for both Limited English Proficient (LEP) and Immigrant Children and Youth (IMM) funds should reflect Title III Program activities only and the two allocations may not be comingled.
  - The use of Title III funds to purchase translation and interpreting services will be limited to activities under Title III guidelines and may not be used for Core ELD Program requirements.

## Non-Public Consultation

- The individual Consortium Member LEAs should ensure that timely and meaningful consultation occur between the local education agency (LEA) and nonpublic schools within the LEAs geographical boundaries prior to any decision that affects the opportunities of eligible nonpublic school children, teachers, and other educational personnel to participate in programs under this act and shall continue throughout the implementation and assessment of activities under these sections.
- The individual Consortium Member LEAs shall make initial contact with nonpublic schools within their geographical boundaries to determine if the latter wishes to participate in the Title III services. To initiate contact, a consortium-generated notification form letter to nonpublic schools will be employed for use by the Consortium Member LEA.
- After the initial contact, regular and ongoing consultation between LEAs and participating nonpublic schools will be monitored upon request by the Consortium Lead to determine the appropriate level of service needed and/or provide consultation on the following topics: identification and assessment of EL students, types of services provided through Title III including how, when, and where; identification of measures used to ensure that the services provided to the private school students are effective.

The parties to this MOU, through their duly authorized representatives, have executed this MOU on the dates set forth below, and certify that they have read, understood, and agreed to the terms and conditions of this MOU as set forth herein. The effective date of this MOU is the date of the signature last affixed to this page.

School/District PALCS

Chester County Intermediate Unit

Signature James Hande

Signature N. N. N.

Date July 6, 2021

Date 8/19/2021

CHESTER COUNTY INTERMEDIATE UNIT  
 INNOVATIVE EDUCATIONAL SERVICES DIVISION  
**2021-22 EL SERVICES**



Empowering Educators of EL Students



SILVER



GOLD



PLATINUM

EL Leadership Council Quarterly Meetings	✓	✓	✓
Federal and PDE EL Updates	✓	✓	✓
Phone and Email Consultations with an EL Consultant	✓	✓	✓
EL Workshops (See back for details)		3 Seats	5 Seats
EL Track at Countywide 2021		1 Seat at each session	3 Seats at each session
Annual, 90-minute Consultation with EL consultant		✓	✓
One Day of Customized EL Professional Learning			✓

Consortium Cost  
 MEMBER SCHOOL DISTRICTS

**NO COST**  
 annually

**\$1,800**  
 annually

**\$3,800**  
 annually

**TO JOIN, PLEASE CONTACT KIMBER TITUS AT KIMBERT@CCIU.ORG OR 484-237-5177**



**EL Leadership Council  
 Quarterly Meetings**

Thursday, October 7, 2021  
 Tuesday, December 7, 2021  
 Wednesday, February 16, 2022  
 Thursday, May 5, 2022

All meetings are held from 2:00 – 3:30 p.m.

**Customized Professional Learning  
 Is Available. Potential Topics Include:**



- Academic Language and ELs
- Best Practices and Strategies for Working with ELs
- Culturally Responsive Teaching Practices
- Supporting and Encouraging Family Engagement
- Supporting Newcomers
- Use of Oral Language and Authentic Conversations in the Classroom
- Understanding Proficiency Levels
- Develop Your LIEP
- Custom Topic

# CHESTER COUNTY INTERMEDIATE UNIT INNOVATIVE EDUCATIONAL SERVICES DIVISION 2021-22 EL SERVICES



## **Developing and Using Your Language Instruction Educational Program (LIEP)**

September 30, 2021 | 9:00 a.m. - 12:00 p.m.

PDE requires all LEAs to develop and use a Language Instruction Educational Program (LIEP) to assure all English Learners have equitable access to academic content. This document should serve as a guide for your faculty and a handbook for EL parents. Participants will explore ways to develop and evaluate an effective LIEP.

## **Supporting English Learners in Content Area Instruction**

October 19, 2021 | 9:00 a.m. - 12:00 p.m.

School communities are responsible for providing English Learners instruction across the curriculum. This workshop will explore ideas and resources to support ELs in mainstream classrooms. Ask a content teacher to join you as we discuss this important topic.

## **US Immigration Law: Implications for Chester County's Undocumented and Unaccompanied Immigrant Children with Lindsay Sweet**

November 2, 2021 | 9:00 a.m. - 3:00 p.m.

This session will bring you up to date on the current legal landscape for many of Chester County's immigrant families by answering some of the most pressing questions being asked by educators across the county.

## **English Learners in Special Education with Sara Kangas, Ph.D.**

November 17, 2021 | 2:00 p.m. - 3:30 p.m.

This workshop is designed to help educators look at important issues surrounding students who are ELs with disabilities. Participants will explore evidence-based practices and engage with strategies and resources to support their English Learners in special education through accommodations and modifications.

## **Reading Engagement and the Use of Multicultural Literature**

March 10, 2022 | 12:00 p.m. - 3:00 p.m.

How can educators, librarians and parents help students become lifelong readers while also providing access to books that authentically reflect students' experiences? This workshop will explore strategies to bring books that represent diverse cultures and backgrounds to life for students.

## **English Learner Expo and Linguistically Diverse Learners Round Table Discussion**

April 5, 2022 | 12:00 p.m. - 3:30 p.m.

Vendors Available | 12:00 p.m. - 2:00 p.m.

Round Table | 2:00 p.m. - 3:30 p.m.

Come learn about community resources that support students and families of ELs and speak to vendor partners about materials, resources, and textbooks available for supporting the ELs in your school/district. Then, join us for our round table discussion on the needs, challenges, and advantages of being linguistically diverse in today's schools.

**To register, visit [mylearningplan.com](http://mylearningplan.com). For questions, contact [kimbert@cciu.org](mailto:kimbert@cciu.org).**

MEMORANDUM OF UNDERSTANDING  
BETWEEN

Harmar Township Police Department

and

Pennsylvania Leadership Charter School

July 09, 2021



**I. Introduction**

**A. Parties**

The following Law Enforcement Authority or Authorities agree to follow the policies and procedures contained in this Memorandum of Understanding (hereinafter "Memorandum"):

Harmar Township Police Department

The following School Entity or Entities agree to follow the policies and procedures contained in this Memorandum:

Pennsylvania Leadership Charter School

**Western Regional Center (The Landings)**

55 Alpha Drive West  
Pittsburgh, PA 15084

**School Law Enforcement Liaison:**

Ms. Renee Donatelli - Office Manager, Western Regional Center  
412-828-3331 or 610-701-3333 ext. 1500

**B.** This Memorandum establishes procedures to be followed when certain incidents—described in Section II below—occur on school property, at any school-sponsored activity, or on a conveyance as described in the Safe Schools Act (such as a school bus) providing transportation to or from a school or school-sponsored activity. This Memorandum does not cover incidents that are outside of those school settings and create no substantial disruption to the learning environment.

**C.** The parties seek to foster a relationship of cooperation and mutual support and to maintain a safe school environment.

**D. Legal Authority**

**1.** The parties make this agreement as required by Article XIII-A of the Public School Code of 1949, popularly known as the "Safe Schools Act," as amended, 24 P. S. § § 13-1301-A—13-1313-A.

**2.** In so recognizing this legal authority, the parties acknowledge their respective duties pursuant to the Safe Schools Act and hereby agree to

support and cooperate with one another in carrying out their joint and several responsibilities thereunder.

**3. Information From Student Records**

**a.** The Law Enforcement Authority shall be governed by the following reporting and information exchange guidelines:

**i.** Criminal History Record Information Act, 18 Pa.C.S. § 9101 et seq.

**ii.** The prohibition against disclosures, specified in section IV(C)(5) of this Memorandum.

**b.** When sharing information and evidence necessary for the Law Enforcement Authority to complete its investigation, the School Entity shall:

**i.** Comply with the Family Educational Rights and Privacy Act (hereinafter "FERPA"), 20 U.S.C. § 1232g, and its implementing regulations at 34 C.F.R. § 99.1 et seq., and 22 Pa. Code § § 12.31-12.33, including any amendments thereto.

**ii.** Comply with the requirements of the Safe Schools Act, 24 P. S. § § 13-1303-A and 13-1313-A, and any amendments thereto.

**iii.** Complete reports as required by section 1303-A of the Safe Schools Act, 24 P. S. § 13-1303-A, and any amendments thereto.

**c.** The School Entity may disclose personally identifiable information from an educational record of a student to the Law Enforcement Authority if a health or safety emergency exists and knowledge of that information is necessary to protect the health or safety of the student or other individuals. In determining whether a health or safety emergency exists, the School Entity may take into account the totality of the circumstances pertaining to a threat to the health or safety of a student or other individuals. If the School Entity determines that there is an articulable and significant threat to the health or safety of a student or other individuals, it may disclose information from education records to the Law Enforcement Authority, if knowledge of that information is necessary for the Law Enforcement Authority to protect the health

or safety of the student or other individuals. The School Entity must record the articulable and significant threat to the health or safety of a student or other individuals so that it can demonstrate—to parents, students and the Family Policy Compliance Office (Questions related to FERPA should be directed to the Family Policy Compliance Office within the U.S. Department of Education.)—what circumstance led it to determine that a health or safety emergency existed and why the disclosure was justified.

**E. Priorities of the Law Enforcement Authority**

1. Help the School Entity prevent delinquent acts through preventive measures, including referrals to support services, diversionary programs, restorative practices, school-wide positive behavior supports, education and deterrence.
2. Investigate as appropriate all incidents reported to have occurred on school property, at any school-sponsored activity, or on a conveyance as described in the Safe Schools Act (including a school bus) providing transportation to or from a school or school-sponsored activity. The investigation of all reported incidents shall be conducted in the manner that the Law Enforcement Authority, in its sole discretion, deems appropriate; but any investigation shall be conducted so as to involve as little disruption to the school environment as is practicable.
3. Identify those responsible for the commission of the reported incident and, where appropriate, apprehend and prosecute those individuals. Identification and apprehension procedures shall involve as little disruption to the school environment as is practicable.
4. Establish and maintain a cooperative relationship with the School Entity in the reporting and resolution of all incidents described in Section II of this document.

**F. Priorities of the School Entity**

1. Help law enforcement prevent delinquent acts through preventive measures, including referrals to support services, diversionary programs, restorative practices, school-wide positive behavior supports, education and deterrence.
2. Create a safe learning environment.

3. Establish and maintain a cooperative relationship with the Law Enforcement Authority in the reporting and resolution of all incidents described in Section II of this document.
4. Provide the Law Enforcement Authority with all relevant information and required assistance in the event of a reported incident.
5. The School Entity shall give the Law Enforcement Authority a copy of the School Entity's behavior support services procedures and invite Law Enforcement Authority representatives to behavior support trainings.

## **II. Notification of Incidents to Law Enforcement**

The School Entity is required to notify law enforcement in specific situations listed in subsection A of this section, and has discretion over whether to notify law enforcement about incidents listed in subsection B of this section. Law enforcement's decision to investigate and file charges may be made in consultation with school administrators.

### **A. Mandatory Notification**

1. The School Entity shall immediately notify the Law Enforcement Authority having jurisdiction where the offense occurred by the most expeditious means practicable of any of the following incidents occurring on school property, at any school-sponsored activity, or on a conveyance as described in the Safe Schools Act (including a school bus) providing transportation to or from a school or school-sponsored activity:

a. The following offenses under 18 Pa.C.S. (relating to crimes and offenses):

i. Section 908 (relating to prohibited offensive weapons).

a. The term "offensive weapon" is defined by section 908 of the Crimes Code as "[a]ny bomb, grenade, machine gun, sawed-off shotgun with a barrel less than 18 inches, firearm specially made or specially adapted for concealment or silent discharge, any blackjack, sandbag, metal knuckles, dagger, knife, razor or cutting instrument, the blade of which is exposed in an automatic way by switch, push-button, spring mechanism, or otherwise, any stun gun, stun baton, taser or other electronic or



electric weapon or other implement for the infliction of serious bodily injury which serves no common lawful purpose.” See 18 Pa.C.S. § 908(c) (relating to definitions).

**b.** Consistent with section 908(b) of the Crimes Code (relating to exceptions), this reporting requirement does not apply to one who possessed or dealt with an offensive weapon solely as a curio or in a dramatic performance, or to one who possessed an offensive weapon briefly in consequence of having found it or taken it from an aggressor, or under circumstances similarly negating any intent or likelihood that the weapon would be used unlawfully.

**ii.** Section 912 (relating to possession of weapon on school property).

**a.** The term “weapon” is defined by section 912 of the Crimes Code to include, but is not limited to, a knife, cutting instrument, cutting tool, nunchuck stick, firearm, shotgun, rifle and any other tool, instrument or implement capable of inflicting serious bodily injury.

**b.** Consistent with section 912(c) of the Crimes Code (relating to defense), this reporting requirement does not apply to a weapon that is: (a) possessed and used in conjunction with a lawful supervised school activity or course; or (b) is possessed for other lawful purpose.

**iii.** Chapter 25 (relating to criminal homicide).

**iv.** Section 2702 (relating to aggravated assault).

**v.** Section 2709.1 (relating to stalking).

**vi.** Section 2901 (relating to kidnapping).

**vii.** Section 2902 (relating to unlawful restraint).

**viii.** Section 3121 (relating to rape).

- ix.** Section 3122.1 (relating to statutory sexual assault).
- x.** Section 3123 (relating to involuntary deviate sexual intercourse).
- xi.** Section 3124.1 (relating to sexual assault).
- xii.** Section 3124.2 (relating to institutional sexual assault).
- xiii.** Section 3125 (relating to aggravated indecent assault).
- xiv.** Section 3126 (relating to indecent assault).
- xv.** Section 3301 (relating to arson and related offenses).
- xvi.** Section 3307 (relating to institutional vandalism), when the penalty is a felony of the third degree.
- xvii.** Section 3502 (relating to burglary).
- xviii.** Section 3503(a) and (b)(1)(v) (relating to criminal trespass).
- xix.** Section 5501 (relating to riot).
- xx.** Section 6110.1 (relating to possession of firearm by minor).

**b.** The possession, use or sale of a controlled substance, designer drug or drug paraphernalia as defined in “The Controlled Substance, Drug, Device and Cosmetic Act,” as amended, 35 P. S. § § 780-101—780-144, popularly known as the “Drug Act.” For purposes of this Memorandum, the terms “controlled substance”, “designer drug” and “drug paraphernalia” shall be defined as they are in section 102 of the Drug Act. See 35 P. S. § 780-102 (relating to definitions).

**c.** Attempt, solicitation or conspiracy to commit any of the offenses listed in paragraphs 1 and 2 of this subsection.

**d.** An offense for which registration is required under 42 Pa.C.S. § 9795.1 (relating to registration).

2. In responding to students who commit an incident listed under section 1303-A(b)(4.1) of the Safe Schools Act (24 P. S. § 13-1303-A(b)(4.1)), a school entity may consider the propriety of utilizing available school-based programs, such as school-wide positive behavior supports, to address the student's behavior. Nothing in this provision shall be read to limit law enforcement's discretion.

**B. Discretionary Notification**

1. The School Entity may notify the Law Enforcement Authority having jurisdiction where the incident occurred of any of the following incidents occurring on school property, at any school-sponsored activity, or on a conveyance as described in the Safe Schools Act (including a school bus) providing transportation to or from a school or school-sponsored activity:

a. The following offenses under 18 Pa.C.S (relating to crimes and offenses):

- i. Section 2701 (relating to simple assault).
- ii. Section 2705 (relating to recklessly endangering another person).
- iii. Section 2706 (relating to terroristic threats).
- iv. Section 2709 (relating to harassment).
- v. Section 3127 (relating to indecent exposure).
- vi. Section 3307 (relating to institutional vandalism), when the penalty is a misdemeanor of the second degree.
- vii. Section 3503(b)(1)(i), (ii), (iii) and (iv), (b.1) and (b.2) (relating to criminal trespass).
- viii. Chapter 39 (relating to theft and related offenses).
- ix. Section 5502 (relating to failure of disorderly persons to disperse upon official order).
- x. Section 5503 (relating to disorderly conduct).
- xi. Section 6305 (relating to sale of tobacco).

**xii.** Section 6306.1 (relating to use of tobacco in schools prohibited).

**xiii.** Section 6308 (relating to purchase, consumption, possession, or transportation of liquor or malt or brewed beverages by a person under 21 years of age).

**b.** Attempt, solicitation or conspiracy to commit any of the offenses listed in subsection (a).

**2.** In exercising its discretion to determine whether to notify law enforcement of such incidents, the School Entity may consider the following factors: the seriousness of the situation, the school's ability to defuse or resolve the situation, the child's intent, the child's age, whether the student has a disability and, if so, the type of disability and its impact on the student's behavior, and other factors believed to be relevant.

**C.** Law Enforcement Response to Notification

**1.** When notified of an incident listed in subsections A or B, law enforcement's decision to investigate and file charges, at the sole discretion of the Law Enforcement Authority, may be made in consultation with school administrators.

**2.** In determining whether to file charges, the Law Enforcement Authority is encouraged to consult with the District Attorney. Where appropriate under the law, part of this consultation may include a discussion about the availability or propriety of utilizing a diversionary program as an alternative to filing charges.

**D.** Notification of the Law Enforcement Authority when incident involves children with disabilities

**1.** If a child with a disability commits an incident of misconduct, school administrators and the Law Enforcement Authority should take into consideration that the child's behavior may be a manifestation of the disability and there may be no intent to commit an unlawful act. A child with a disability under this subsection shall mean a student with an IEP, a protected handicapped student with a service agreement that includes a behavior support plan, or such student for whom an evaluation is pending under 22 Pa. Code § 14.123 (relating to evaluation), 15.5 (relating to school district initiated evaluation and provision of services), 15.6 (relating to parent initiated evaluation and provision of services), or

Chapter 711 (relating to charter school and cyber charter school services and programs for children with disabilities).

2. In the event a child with a disability commits a mandatory notification offense under Subsection A, the School Entity must provide immediate notification to the Law Enforcement Authority regardless of the disability. Such notification will state that the child has an IEP or a service agreement that includes a behavior support plan and may include the School Entity's recommendation that police intervention may not be required and advisement that the School Entity will act to address the student's behavior need as required by applicable federal and state law and regulations, including 22 Pa. Code § § 14.133 (relating to positive behavior support), 15.3 (relating to protected handicapped students—general) or 711.46 (relating to positive behavior support). The Law Enforcement Authority may take the recommendation under advisement but reserves the right to investigate and file charges.

3. In the event a child with a disability commits a discretionary offense under Subsection B and the School Entity does not believe that police intervention is necessary, the School Entity will address the student's behavior need as required by applicable federal and state law and regulations, including 22 Pa. Code § § 14.133, 15.3 or 711.46.

4. In accordance with 34 CFR 300.535 (relating to referral to and action by law enforcement and judicial authorities), nothing will prohibit the School Entity from reporting an offense committed by a child with a disability to the Law Enforcement Authority, and nothing will prevent State law enforcement and judicial authorities from exercising their responsibilities with regard to the application of Federal and State law to crimes committed by a child with a disability.

5. The School Entity, when reporting an offense committed by a child with a disability, should ensure that copies of the special education and disciplinary records of the child are transmitted for consideration by the appropriate authorities to the Law Enforcement Authority to whom the incident was reported.

6. The School Entity, when reporting an incident under this section, may transmit copies of the child's special education and disciplinary records only to the extent that the transmission is permitted by FERPA.

[Describe any specific procedures to be followed for incidents involving a student with a disability having an IEP as required by 22 Pa. Code § 14.104 (relating to special education plans) or 22 Pa. Code Chapter 711

(relating to charter school and cyber charter school services and programs for children with disabilities)]

The procedure followed by PA Leadership Charter School is as follows:

1. Notify the correct personnel of the incident: Grade Level Coordinator, Special Education teacher, Director of Special Education, and/or PALCS' Center Consultant.
2. Notify the parent if the child must be dismissed from the PALCS facility immediately.
3. Once the Director of Special Education has been notified, the Director will schedule an IEP meeting with the family and necessary personnel and provide the family with a copy of the district's Procedural Safeguards Notice as per IDEA regulations.
4. A Manifestation Determination meeting must be held the next school day.
5. During this meeting the team will determine whether or not the behavioral incident was a result of the student's disability.
  - a. If the team determines the incident to be a result of the disability, then the IEP team must take steps to remedy any and all deficiencies found in the student's IEP. This could include changing placement, putting additional support in place, etc.
  - b. If the team determines that the incident is not a result of the disability, then the student may be disciplined as per the student handbook.
  - c. It is important to note that this decision must be made by the IEP team, including the parent.

Further, students with Emotional Disturbance may have Positive Behavior Support plans in accordance with the IEP.

**E.** Upon notification of the incident to the Law Enforcement Authority, the School Entity shall provide as much of the following information as is available at the time of notification. In no event shall the gathering of information unnecessarily delay notification:

1. Whether the incident is in-progress or has concluded.
2. Nature of the incident.
3. Exact location of the incident.

4. Number of persons involved in the incident.
5. Names and ages of the individuals involved.
6. Weapons, if any, involved in the incident.
7. Whether the weapons, if any, have been secured and, if so, the custodian of the weapons.
8. Injuries involved.
9. Whether EMS or the Fire Department have been notified.
10. Identity of the school contact person.
11. Identity of the witnesses to the incident, if any.
12. Whether the incident involves a student with a disability and, if so, the type of disability and its impact on the student's behavior.
13. Other such information as is known to the school entity and believed to be relevant to the incident.

**F.** No later than September 30 of each year, the School Entity shall assemble and make ready for immediate deployment to its Incident Command Post the following information for the purpose of assisting the Law Enforcement Authority in responding to an emergency:

1. Blueprints or floor plans of the school buildings.
2. Aerial photo, map or layout of the school campus, adjacent properties and surrounding streets or roads.
3. Location(s) of predetermined or prospective command posts.
4. Current teacher/employee roster.
5. Current student roster.
6. Most recent school yearbook.
7. School fire-alarm shutoff location and procedures.
8. School sprinkler system shutoff location and procedures.

9. Gas/utility line layouts and shutoff valve locations.
10. Cable/satellite television shutoff location and procedures.
11. Other information the School Entity deems pertinent to assist local police departments in responding to an emergency.

### **III. Law Enforcement Authority Response**

A. Depending on the totality of the circumstances, initial response by the Law Enforcement Authority may include:

1. For incidents in progress:
  - a. Meet with contact person and locate scene of incident.
  - b. Stabilize incident.
  - c. Provide/arrange for emergency medical treatment, if necessary.
  - d. Control the scene of the incident.
    - i. Secure any physical evidence at the scene.
    - ii. Identify involved persons and witnesses.
  - e. Conduct investigation.
  - f. Exchange information.
  - g. Confer with school officials to determine the extent of law enforcement involvement required by the situation.
2. Incidents not in progress:
  - a. Meet with contact person.
  - b. Recover any physical evidence.
  - c. Conduct investigation.
  - d. Exchange information.
  - e. Confer with school officials to determine the extent of law enforcement involvement required by the situation.



**3. Incidents initially reported to the Law Enforcement Authority**

If any incident described in sections IIA or IIB is initially reported to the Law Enforcement Authority, the Law Enforcement Authority shall proceed directly with its investigation, shall immediately notify the School Entity of the incident, and shall proceed as outlined in sections IIA through IIE.

**B. Custody of Actors**

**1.** Students identified as actors in reported incidents may be taken into custody at the discretion of the investigating law enforcement officer under any of the following circumstances:

- a.** The student has been placed under arrest.
- b.** The student is being placed under investigative detention.
- c.** The student is being taken into custody for the protection of the student.
- d.** The student's parent or guardian consents to the release of the student to law enforcement custody.

**2.** The investigating law enforcement officer shall take all appropriate steps to protect the legal and constitutional rights of those students being taken into custody.

**IV. Assistance of School Entities**

**A. In Loco Parentis**

**1.** Teachers, Guidance Counselors, Vice Principals and Principals in the public schools have the right to exercise the same authority as a parent, guardian or person in parental relation to such pupil concerning conduct and behavior over the pupils attending a school during the time they are in attendance, including the time required in going to and from their homes.

**2.** School authorities' ability to stand in loco parentis over children does not extend to matters beyond conduct and discipline during school, school activities, or on a conveyance as described in the Safe Schools Act providing transportation to or from school or a school-sponsored activity.

**B. Notification of Parent or Guardian**

1. Parents or guardians of all victims and suspects directly involved in an incident listed under Section IIA or IIB shall be immediately notified of the involvement, and they shall be informed about any notification regarding the incident that has been, or may be, made to the Law Enforcement Authority.

2. The School Entity shall document attempts made to reach the parents or guardians of all victims and suspects directly involved in an incident listed under Section IIA or IIB.

**C. Scope of School Entity's Involvement**

1. **General Principles:** Once the Law Enforcement Authority assumes primary responsibility for a matter, the legal conduct of interviews, interrogations, searches, seizures of property, and arrests are within the purview of the Law Enforcement Authority. The School Entity shall defer to the Law Enforcement Authority on matters of criminal and juvenile law procedure, except as is necessary to protect the interests of the School Entity. The Law Enforcement Authority will keep the chief school administrator, or his designees, informed of the status of pending investigations.

2. **Victims**

a. The School Entity shall promptly notify the parent or guardian of a victim when the Law Enforcement Authority interviews that victim. The Law Enforcement Authority shall follow its policies and procedures when interviewing a victim to ensure the protection of the victim's legal and constitutional rights.

b. In the event a victim is interviewed by Law Enforcement Authority on school property, a guidance counselor or similar designated personnel may be present during the interview.

3. **Witnesses**

a. The School Entity shall promptly notify the parent or guardian of a witness when the Law Enforcement Authority interviews that witness. The Law Enforcement Authority shall follow its policies and procedures when interviewing a witness to ensure the protection of the witness's legal and constitutional rights.

b. In the event a witness is interviewed by the Law Enforcement Authority on school property, a guidance counselor

or similar designated personnel should be present during the interview.

**4. Suspects and Custodial Interrogation**

**a.** The School Entity shall help the Law Enforcement Authority to secure the permission and presence of at least one parent or guardian of a student suspect before that student is interrogated by law enforcement authorities.

**b.** When a parent or guardian is not present, school authorities shall not stand in loco parentis (in the place of the parent/guardian) during an interview.

**c.** If an interested adult cannot be contacted, the School Entity shall defer to the investigating Law Enforcement Authority, which will protect the student suspect's legal and constitutional rights as required by law.

**5. Conflicts of Interest**

**a.** The parties to this Memorandum recognize that if a School Entity employee, contractor, or agent of the School Entity is the subject of an investigation, a conflict of interest may exist between the School Entity and the adult suspect.

**b.** Neither the individual that is the subject of the investigation, nor any person acting as his/her subordinate or direct supervisor, shall be present during Law Enforcement Authority's interviews of student co-suspects, victims or witnesses by the Law Enforcement Authority.

**c.** Neither the individual who is the subject of the investigation, nor his/her subordinate(s) and/or direct supervisor(s), shall be informed of the contents of the statements made by student co-suspects, victims or witnesses, except at the discretion of the Law Enforcement Authority or as otherwise required by law.

**D. Reporting Requirements**

All school entities are required to submit an annual report, which will include violence statistics and reports, to the Department of Education's Office for Safe Schools. This annual report must include all new incidents described in Sections IIA and IIB. Before submitting the required annual report, each chief school

administrator and each police department having jurisdiction over school property of the School Entity shall do the following:

**a.** No later than thirty days prior to the deadline for submitting the annual report, the chief school administrator shall submit the report to the police department with jurisdiction over the relevant school property. The police department shall review the report and compare the data regarding criminal offenses and notification of law enforcement to determine its accuracy.

**b.** No later than fifteen days prior to the deadline for submitting the annual report, the police department shall notify the chief school administrator, in writing, whether the report accurately reflects police incident data. Where the police department determines that the report accurately reflects police incident data, the chief of police shall sign the report. Where the police department determines that the report does not accurately reflect police incident data, the police department shall indicate any discrepancies between the report and police incident data.

**c.** Prior to submitting the annual report, the chief school administrator and the police department shall attempt to resolve discrepancies between the report and police incident data. Where a discrepancy remains unresolved, the police department shall notify the chief school administrator and the office in writing.

**d.** Where a police department fails to take action as required under clause a or b, the chief school administrator shall submit the annual report and indicate that the police department failed to take action as required under clause a or b.

**e.** Where there are discrepancies between the School Entity's incident data and the police incident data, the following shall occur:

The chief school administrator or designee will review any discrepancy indicated by a police department under par. b, and review any data discrepancies and determine the exact nature of any discrepancy. This school official will then review the documentation available to the school and determine whether the school's incident data is consistent with the documentation. If this does not resolve the discrepancy, the school will determine whether further investigation might address the discrepancy. This could include interviews with school officials or others with direct knowledge of the incident in question. The school will consult with the police department if the discrepancy has not been resolved

at this stage. If the discrepancy is still unresolved, the school will make a notation of the discrepancy in its report.

**V. General Provisions**

**A.** This Memorandum does not create any contractual rights or obligations between the signatory Law Enforcement Authority, the signatory School Entity, any other signatory authorities or entities, or their respective officers, employees, agents or representatives.

**B.** This Memorandum may be amended, expanded or modified at any time upon the written consent of the parties. It must be reviewed and re-executed within two years of the date of its original execution and every two years thereafter.

**C.** If changes in state or federal law require changes to this Memorandum, the parties shall amend this Memorandum.

**D.** All parties to this Memorandum will communicate fully and openly with each other in order to resolve any problems that may arise in the fulfillment of the terms of this Memorandum.

---

Dr. James Hanak  
Chief School Administrator  
Pennsylvania Leadership Charter School  
School Entity



Jason Domaratz  
Chief of Police  
Harmar Township Police Department  
Law Enforcement Authority



Renee' Donatelli  
Office Manager, Western Regional Center  
Building Principal

MEMORANDUM OF UNDERSTANDING

BETWEEN

Westtown-East Goshen Police Department

(Law Enforcement Authority)

and

Pennsylvania Leadership Charter School

(School Entity)

Jul 22, 2021

(Date)

## I. Introduction

### A. Parties

The following Law Enforcement Authority or Authorities agree to follow the policies and procedures contained in this Memorandum of Understanding (hereinafter "Memorandum"):

Westtown East Goshen Police Department

The following School Entity or Entities agree to follow the policies and procedures contained in this Memorandum:

Pennsylvania Leadership Charter School

Building 1: **Enterprise Main Office**

1332 Enterprise Drive

West Chester , PA 19380

**School Law Enforcement Liaison:**

Director of Human Resources - Mr. Seth Heiland, 610-701-3333

ext. 1127

Middle School Principal – Dr. Karla Johnson, 610-701-3333 ext.

Building 2: **Advanced Ideas Center (AIC)**

1585 Paoli Pike  
West Chester, PA 19380

**School Law Enforcement Liaison:**

Principal of University Scholars – Mr. Christopher Stiles, 610-344-0524 or  
610-701-3333 ext. 1402

Office Coordinator for University Scholars – Mrs. Kathy Moretti, 610-344-0524 or  
610-701-3333 ext. 1400

Building 3: **PALCS High School**

1645 West Chester Pike  
West Chester, PA 19382

**School Law Enforcement Liaison:**

High School Supervisor – Michael Logue, 610-701-3333 ext. 1143

**B.** This Memorandum establishes procedures to be followed when certain incidents—described in Section II below—occur on school property, at any school-sponsored activity, or on a conveyance as described in the Safe Schools Act (such as a school bus) providing transportation to or from a school or school-sponsored activity. This Memorandum does not cover incidents that are outside of those school settings and create no substantial disruption to the learning environment.

**C.** The parties seek to foster a relationship of cooperation and mutual support and to maintain a safe school environment.

**D.** Legal Authority



1. The parties make this agreement as required by Article XIII-A of the Public School Code of 1949, popularly known as the "Safe Schools Act," as amended, 24 P. S. § § 13-1301-A—13-1313-A.

2. In so recognizing this legal authority, the parties acknowledge their respective duties pursuant to the Safe Schools Act and hereby agree to support and cooperate with one another in carrying out their joint and several responsibilities thereunder.

3. Information From Student Records

a. The Law Enforcement Authority shall be governed by the following reporting and information exchange guidelines:

i. Criminal History Record Information Act, 18 Pa.C.S. § 9101 et seq.

ii. The prohibition against disclosures, specified in section IV(C)(5) of this Memorandum.

b. When sharing information and evidence necessary for the Law Enforcement Authority to complete its investigation, the School Entity shall:

i. Comply with the Family Educational Rights and Privacy Act (hereinafter "FERPA"), 20 U.S.C. § 1232g, and its implementing regulations at 34 C.F.R. § 99.1 et seq., and 22 Pa. Code § § 12.31-12.33, including any amendments thereto.

ii. Comply with the requirements of the Safe Schools Act, 24 P. S. § § 13-1303-A and 13-1313-A, and any amendments thereto.

iii. Complete reports as required by section 1303-A of the Safe Schools Act, 24 P. S. § 13-1303-A, and any amendments thereto.

c. The School Entity may disclose personally identifiable information from an educational record of a student to the Law Enforcement Authority if a health or safety emergency exists and knowledge of that information is necessary to protect the health or safety of the student or other individuals. In determining whether a health or safety emergency exists, the School Entity may take into account the totality of the circumstances pertaining to a threat to the health or safety of a student or other individuals. If the School Entity determines that there is an articulable and significant threat to the health or safety of a student or other individuals, it may disclose information from education records to the Law Enforcement Authority, if knowledge of that information is necessary for the Law Enforcement Authority to protect the health or safety of the student or other individuals. The School Entity must record the articulable and significant threat to the health or safety of a student or other individuals so that it can demonstrate—to parents, students and the Family Policy Compliance Office (Questions related to FERPA should be directed to the Family Policy Compliance Office within the U.S. Department of Education.)—what circumstance led it to determine that a health or safety emergency existed and why the disclosure was justified.

#### E. Priorities of the Law Enforcement Authority

1. Help the School Entity prevent delinquent acts through preventive measures, including referrals to support services, diversionary programs, restorative practices, school-wide positive behavior supports, education and deterrence.

2. Investigate as appropriate all incidents reported to have occurred on school property, at any school-sponsored activity, or on a conveyance as described in the Safe Schools Act (including a school bus) providing transportation to or from a school or school-sponsored activity. The investigation of all reported incidents shall be conducted in the manner that the Law Enforcement Authority, in its sole discretion, deems appropriate; but any investigation shall be conducted so as to involve as little disruption to the school environment as is practicable.

3. Identify those responsible for the commission of the reported incident and, where appropriate, apprehend and prosecute those individuals. Identification and apprehension procedures shall involve as little disruption to the school environment as is practicable.

4. Establish and maintain a cooperative relationship with the School Entity in the reporting and resolution of all incidents described in Section II of this document.

#### F. Priorities of the School Entity

1. Help law enforcement prevent delinquent acts through preventive measures, including referrals to support services, diversionary programs, restorative practices, school-wide positive behavior supports, education and deterrence.

2. Create a safe learning environment.

3. Establish and maintain a cooperative relationship with the Law Enforcement Authority in the reporting and resolution of all incidents described in Section II of this document.

4. Provide the Law Enforcement Authority with all relevant information and required assistance in the event of a reported incident.

5. The School Entity shall give the Law Enforcement Authority a copy of the School Entity's behavior support services procedures and invite Law Enforcement Authority representatives to behavior support trainings.

6. The School Entity will offer and promote the use of <https://www.safe2saypa.org/> among students.

## II. Notification of Incidents to Law Enforcement

The School Entity is required to notify law enforcement in specific situations listed in subsection A of this section, and has discretion over whether to notify law enforcement about incidents listed in subsection B of this section. Law enforcement's decision to investigate and file charges may be made in consultation with school administrators.

### A. Mandatory Notification

1. The School Entity shall immediately notify the Law Enforcement Authority having jurisdiction where the offense occurred by the most expeditious means practicable of any of the following incidents occurring on school property, at any school-sponsored activity, or on a conveyance as described in the Safe Schools Act (including a school bus) providing transportation to or from a school or school-sponsored activity:

a. The following offenses under 18 Pa.C.S. (relating to crimes and offenses):

i. Section 908 (relating to prohibited offensive weapons).

a. The term "offensive weapon" is defined by section 908 of the Crimes Code as "[a]ny bomb, grenade, machine gun, sawed-off shotgun with a barrel less than 18 inches,

firearm specially made or specially adapted for concealment or silent discharge, any blackjack, sandbag, metal knuckles, dagger, knife, razor or cutting instrument, the blade of which is exposed in an automatic way by switch, push-button, spring mechanism, or otherwise, any stun gun, stun baton, taser or other electronic or electric weapon or other implement for the infliction of serious bodily injury which serves no common lawful purpose.” See 18 Pa.C.S. § 908(c) (relating to definitions).

**b.** Consistent with section 908(b) of the Crimes Code (relating to exceptions), this reporting requirement does not apply to one who possessed or dealt with an offensive weapon solely as a curio or in a dramatic performance, or to one who possessed an offensive weapon briefly in consequence of having found it or taken it from an aggressor, or under circumstances similarly negating any intent or likelihood that the weapon would be used unlawfully.

**ii.** Section 912 (relating to possession of weapon on school property).

**a.** The term “weapon” is defined by section 912 of the Crimes Code to include, but is not limited to, a knife, cutting instrument, cutting tool, nunchuck stick, firearm, shotgun, rifle and any other tool, instrument or implement capable of inflicting serious bodily injury.

**b.** Consistent with section 912(c) of the Crimes Code (relating to defense), this reporting requirement does not apply to a weapon that is: (a) possessed and used in conjunction with a lawful supervised school activity or course; or (b) is possessed for other lawful purpose.

**iii.** Chapter 25 (relating to criminal homicide).

- iv.** Section 2702 (relating to aggravated assault).
- v.** Section 2709.1 (relating to stalking).
- vi.** Section 2901 (relating to kidnapping).
- vii.** Section 2902 (relating to unlawful restraint).
- viii.** Section 3121 (relating to rape).
- ix.** Section 3122.1 (relating to statutory sexual assault).
- x.** Section 3123 (relating to involuntary deviate sexual intercourse).
- xi.** Section 3124.1 (relating to sexual assault).
- xii.** Section 3124.2 (relating to institutional sexual assault).
- xiii.** Section 3125 (relating to aggravated indecent assault).
- xiv.** Section 3126 (relating to indecent assault).
- xv.** Section 3301 (relating to arson and related offenses).

**xvi.** Section 3307 (relating to institutional vandalism), when the penalty is a felony of the third degree.

**xvii.** Section 3502 (relating to burglary).

**xviii.** Section 3503(a) and (b)(1)(v) (relating to criminal trespass).

**xix.** Section 5501 (relating to riot).

**xx.** Section 6110.1 (relating to possession of firearm by minor).

**b.** The possession, use or sale of a controlled substance, designer drug or drug paraphernalia as defined in "The Controlled Substance, Drug, Device and Cosmetic Act," as amended, 35 P. S. § § 780-101—780-144, popularly known as the "Drug Act." For purposes of this Memorandum, the terms "controlled substance", "designer drug" and "drug paraphernalia" shall be defined as they are in section 102 of the Drug Act. See 35 P. S. § 780-102 (relating to definitions).

**c.** Attempt, solicitation or conspiracy to commit any of the offenses listed in paragraphs 1 and 2 of this subsection.

**d.** An offense for which registration is required under 42 Pa.C.S. § 9795.1 (relating to registration).

**2.** In responding to students who commit an incident listed under section 1303-A(b)(4.1) of the Safe Schools Act (24 P. S. § 13-1303-A(b)(4.1)), a school entity may consider the propriety of utilizing available school-based programs,

such as school-wide positive behavior supports, to address the student's behavior. Nothing in this provision shall be read to limit law enforcement's discretion.

**B. Discretionary Notification**

**1.** The School Entity may notify the Law Enforcement Authority having jurisdiction where the incident occurred of any of the following incidents occurring on school property, at any school-sponsored activity, or on a conveyance as described in the Safe Schools Act (including a school bus) providing transportation to or from a school or school-sponsored activity:

**a.** The following offenses under 18 Pa.C.S (relating to crimes and offenses):

**i.** Section 2701 (relating to simple assault).

**ii.** Section 2705 (relating to recklessly endangering another person).

**iii.** Section 2706 (relating to terroristic threats).

**iv.** Section 2709 (relating to harassment).

**v.** Section 3127 (relating to indecent exposure).

**vi.** Section 3307 (relating to institutional vandalism), when the penalty is a misdemeanor of the second degree.



- vii.** Section 3503(b)(1)(i), (ii), (iii) and (iv), (b.1) and (b.2) (relating to criminal trespass).
  
  - viii.** Chapter 39 (relating to theft and related offenses).
  
  - ix.** Section 5502 (relating to failure of disorderly persons to disperse upon official order).
  
  - x.** Section 5503 (relating to disorderly conduct).
  
  - xi.** Section 6305 (relating to sale of tobacco).
  
  - xii.** Section 6306.1 (relating to use of tobacco in schools prohibited).
  
  - xiii.** Section 6308 (relating to purchase, consumption, possession, or transportation of liquor or malt or brewed beverages by a person under 21 years of age).
- b.** Attempt, solicitation or conspiracy to commit any of the offenses listed in subsection (a).

**2.** In exercising its discretion to determine whether to notify law enforcement of such incidents, the School Entity may consider the following factors: the seriousness of the situation, the school's ability to defuse or resolve the situation, the child's intent, the child's age, whether the student has a disability and, if so, the type of disability and its impact on the student's behavior, and other factors believed to be relevant.

**C. Law Enforcement Response to Notification**

1. When notified of an incident listed in subsections A or B, law enforcement's decision to investigate and file charges, at the sole discretion of the Law Enforcement Authority, may be made in consultation with school administrators.
2. In determining whether to file charges, the Law Enforcement Authority is encouraged to consult with the District Attorney. Where appropriate under the law, part of this consultation may include a discussion about the availability or propriety of utilizing a diversionary program as an alternative to filing charges.

**D. Notification of the Law Enforcement Authority when incident involves children with disabilities**

1. If a child with a disability commits an incident of misconduct, school administrators and the Law Enforcement Authority should take into consideration that the child's behavior may be a manifestation of the disability and there may be no intent to commit an unlawful act. A child with a disability under this subsection shall mean a student with an IEP, a protected student with a disability with a service agreement that includes a behavior support plan, or such student for whom an evaluation is pending under 22 Pa. Code § § 14.123 (relating to evaluation), 15.5 (relating to school district initiated evaluation and provision of services), 15.6 (relating to parent initiated evaluation and provision of services), or Chapter 711 (relating to charter school and cyber charter school services and programs for children with disabilities).
2. In the event a child with a disability commits a mandatory notification offense under Subsection A, the School Entity must provide immediate notification to the Law Enforcement Authority regardless of the disability. Such notification will state that the child has an IEP or a service agreement that includes a behavior support plan and may include the School Entity's recommendation that police intervention may not be required and advisement that the School Entity will act to address the student's behavior need as required by applicable federal and state law and regulations, including 22 Pa. Code § § 14.133 (relating to positive behavior support), 15.3 (relating to protected

handicapped students—general) or 711.46 (relating to positive behavior support). The Law Enforcement Authority may take the recommendation under advisement but reserves the right to investigate and file charges.

**3.** In the event a child with a disability commits a discretionary offense under Subsection B and the School Entity does not believe that police intervention is necessary, the School Entity will address the student's behavior need as required by applicable federal and state law and regulations, including 22 Pa. Code §§ 14.133, 15.3 or 711.46.

**4.** In accordance with 34 CFR 300.535 (relating to referral to and action by law enforcement and judicial authorities), nothing will prohibit the School Entity from reporting an offense committed by a child with a disability to the Law Enforcement Authority, and nothing will prevent State law enforcement and judicial authorities from exercising their responsibilities with regard to the application of Federal and State law to crimes committed by a child with a disability.

**5.** The School Entity, when reporting an offense committed by a child with a disability, should ensure that copies of the special education and disciplinary records of the child are transmitted for consideration by the appropriate authorities to the Law Enforcement Authority to whom the incident was reported.

**6.** The School Entity, when reporting an incident under this section, may transmit copies of the child's special education and disciplinary records only to the extent that the transmission is permitted by FERPA.

[Describe any specific procedures to be followed for incidents involving a student with a disability having an IEP as required by 22 Pa. Code § 14.104 (relating to special education plans) or 22 Pa. Code Chapter 711 (relating to charter school and cyber charter school services and programs for children with disabilities)]

The procedure followed by PA Leadership Charter School is as follows:

1. Notify the correct personnel of the incident: Division Principal, Special Education teacher, Director of Special Education, and/or PALCS' Center Consultant.
2. Notify the parent if the child must be dismissed from the PALCS facility immediately.
3. Once the Director of Special Education has been notified, the Director will schedule an IEP meeting with the family and necessary personnel and provide the family with a copy of the district's Procedural Safeguards Notice as per IDEA regulations.
4. A Manifestation Determination meeting must be held the next school day.
5. During this meeting the team will determine whether or not the behavioral incident was a result of the student's disability.
  - a. If the team determines the incident to be a result of the disability, then the IEP team must take steps to remedy any and all deficiencies found in the student's IEP. This could include changing placement, putting additional support in place, etc.
  - b. If the team determines that the incident is not a result of the disability, then the student may be disciplined as per the student handbook.
  - c. It is important to note that this decision must be made by the IEP team, including the parent.

Further, students with Emotional Disturbance may have Positive Behavior Support plans in accordance with the IEP.

**E.** Upon notification of the incident to the Law Enforcement Authority, the School Entity shall provide as much of the following information as is available at the time of notification. In no event shall the gathering of information unnecessarily delay notification:

1. Whether the incident is in-progress or has concluded.
2. Nature of the incident.

3. Exact location of the incident.
  4. Number of persons involved in the incident.
  5. Names and ages of the individuals involved.
  6. Weapons, if any, involved in the incident.
  7. Whether the weapons, if any, have been secured and, if so, the custodian of the weapons.
  8. Injuries involved.
  9. Whether EMS or the Fire Department have been notified.
  10. Identity of the school contact person.
  11. Identity of the witnesses to the incident, if any.
  12. Whether the incident involves a student with a disability and, if so, the type of disability and its impact on the student's behavior.
  13. Other such information as is known to the school entity and believed to be relevant to the incident.
- F. No later than September 30 of each year, the School Entity shall assemble and make ready for immediate deployment to its Incident Command Post the following

information for the purpose of assisting the Law Enforcement Authority in responding to an emergency:

1. Blueprints or floor plans of the school buildings.
2. Aerial photo, map or layout of the school campus, adjacent properties and surrounding streets or roads.
3. Location(s) of predetermined or prospective command posts.
4. Current teacher/employee roster.
5. Current student roster.
6. Most recent school yearbook.
7. School fire-alarm shutoff location and procedures.
8. School sprinkler system shutoff location and procedures.
9. Gas/utility line layouts and shutoff valve locations.
10. Cable/satellite television shutoff location and procedures.
11. Other information the School Entity deems pertinent to assist local police departments in responding to an emergency.

### **III. Law Enforcement Authority Response**

**A.** Depending on the totality of the circumstances, initial response by the Law Enforcement Authority may include:

- 1.** For incidents in progress:
  - a.** Meet with contact person and locate scene of incident.
  - b.** Stabilize incident.
  - c.** Provide/arrange for emergency medical treatment, if necessary.
  - d.** Control the scene of the incident.
    - i.** Secure any physical evidence at the scene.
    - ii.** Identify involved persons and witnesses.
  - e.** Conduct investigation.
  - f.** Exchange information.
  - g.** Confer with school officials to determine the extent of law enforcement involvement required by the situation.

2. Incidents not in progress:
  - a. Meet with contact person.
  - b. Recover any physical evidence.
  - c. Conduct investigation.
  - d. Exchange information.
  - e. Confer with school officials to determine the extent of law enforcement involvement required by the situation.
  
3. Incidents initially reported to the Law Enforcement Authority

If any incident described in sections IIA or IIB is initially reported to the Law Enforcement Authority, the Law Enforcement Authority shall proceed directly with its investigation, shall immediately notify the School Entity of the incident, and shall proceed as outlined in sections IIA through IIE.

**B. Custody of Actors**

1. Students identified as actors in reported incidents may be taken into custody at the discretion of the investigating law enforcement officer under any of the following circumstances:



- a. The student has been placed under arrest.
- b. The student is being placed under investigative detention.
- c. The student is being taken into custody for the protection of the student.
- d. The student's parent or guardian consents to the release of the student to law enforcement custody.

2. The investigating law enforcement officer shall take all appropriate steps to protect the legal and constitutional rights of those students being taken into custody.

#### **IV. Assistance of School Entities**

##### **A. In Loco Parentis**

1. Teachers, School Counselors, Assistant Principals and Principals in the public schools have the right to exercise the same authority as a parent, guardian or person in parental relation to such pupil concerning conduct and behavior over the pupils attending a school during the time they are in attendance, including the time required in going to and from their homes.

2. School authorities' ability to stand in loco parentis over children does not extend to matters beyond conduct and discipline during school, school activities, or on a conveyance as described in the Safe Schools Act providing transportation to or from school or a school-sponsored activity.

**B. Notification of Parent or Guardian**

1. Parents or guardians of all victims and suspects directly involved in an incident listed under Section IIA or IIB shall be immediately notified of the involvement, and they shall be informed about any notification regarding the incident that has been, or may be, made to the Law Enforcement Authority.
2. The School Entity shall document attempts made to reach the parents or guardians of all victims and suspects directly involved in incident listed under Section IIA or IIB.

**C. Scope of School Entity's Involvement**

1. General Principles: Once the Law Enforcement Authority assumes primary responsibility for a matter, the legal conduct of interviews, interrogations, searches, seizures of property, and arrests are within the purview of the Law Enforcement Authority. The School Entity shall defer to the Law Enforcement Authority on matters of criminal and juvenile law procedure, except as is necessary to protect the interests of the School Entity. The Law Enforcement Authority will keep the chief school administrator, or his designees, informed of the status of pending investigations.

**2. Victims**

a. The School Entity shall promptly notify the parent or guardian of a victim when the Law Enforcement Authority interviews that victim. The Law Enforcement Authority shall follow its policies and procedures when interviewing a victim to ensure the protection of the victim's legal and constitutional rights.

b. In the event a victim is interviewed by Law Enforcement Authority on school property, a guidance counselor or similar designated personnel may be present during the interview.

### 3. Witnesses

**a.** The School Entity shall promptly notify the parent or guardian of a witness when the Law Enforcement Authority interviews that witness. The Law Enforcement Authority shall follow its policies and procedures when interviewing a witness to ensure the protection of the witness's legal and constitutional rights.

**b.** In the event a witness is interviewed by the Law Enforcement Authority on school property, a guidance counselor or similar designated personnel should be present during the interview.

### 4. Suspects and Custodial Interrogation

**a.** The School Entity shall help the Law Enforcement Authority to secure the permission and presence of at least one parent or guardian of a student suspect before that student is interrogated by law enforcement authorities.

**b.** When a parent or guardian is not present, school authorities shall not stand in loco parentis (in the place of the parent/guardian) during an interview.

**c.** If an interested adult cannot be contacted, the School Entity shall defer to the investigating Law Enforcement Authority, which will protect the student suspect's legal and constitutional rights as required by law.

### 5. Conflicts of Interest

**a.** The parties to this Memorandum recognize that if a School Entity employee, contractor, or agent of the School Entity is the subject of an

investigation, a conflict of interest may exist between the School Entity and the adult suspect.

**b.** Neither the individual that is the subject of the investigation, nor any person acting as his/her subordinate or direct supervisor, shall be present during Law Enforcement Authority's interviews of student co-suspects, victims or witnesses by the Law Enforcement Authority.

**c.** Neither the individual who is the subject of the investigation, nor his/her subordinate(s) and/or direct supervisor(s), shall be informed of the contents of the statements made by student co-suspects, victims or witnesses, except at the discretion of the Law Enforcement Authority or as otherwise required by law.

**D. Reporting Requirements**

All school entities are required to submit an annual report, which will include violence statistics and reports, to the Department of Education's Office for Safe Schools. This annual report must include all new incidents described in Sections IIA and IIB. Before submitting the required annual report, each chief school administrator and each police department having jurisdiction over school property of the School Entity shall do the following:

**a.** No later than thirty days prior to the deadline for submitting the annual report, the chief school administrator shall submit the report to the police department with jurisdiction over the relevant school property. The police department shall review the report and compare the data regarding criminal offenses and notification of law enforcement to determine its accuracy.

**b.** No later than fifteen days prior to the deadline for submitting the annual report, the police department shall notify the chief school administrator, in writing, whether the report accurately reflects police incident data. Where the police department determines that the report accurately reflects police incident data, the chief of police shall sign the report. Where the police department determines that the report does not

accurately reflect police incident data, the police department shall indicate any discrepancies between the report and police incident data.

**c.** Prior to submitting the annual report, the chief school administrator and the police department shall attempt to resolve discrepancies between the report and police incident data. Where a discrepancy remains unresolved, the police department shall notify the chief school administrator and the office in writing.

**d.** Where a police department fails to take action as required under clause a or b, the chief school administrator shall submit the annual report and indicate that the police department failed to take action as required under clause a or b.

**e.** Where there are discrepancies between the School Entity's incident data and the police incident data, the following shall occur:

The chief school administrator or designee will review any discrepancy indicated by a police department under par. b, and review any data discrepancies and determine the exact nature of any discrepancy. This school official will then review the documentation available to the school and determine whether the school's incident data is consistent with the documentation. If this does not resolve the discrepancy, the school will determine whether further investigation might address the discrepancy. This could include interviews with school officials or others with direct knowledge of the incident in question. The school will consult with the police department if the discrepancy has not been resolved at this stage. If the discrepancy is still unresolved, the school will make a notation of the discrepancy in its report.

## **V. General Provisions**

**A.** This Memorandum does not create any contractual rights or obligations between the signatory Law Enforcement Authority, the signatory School Entity, any other

signatory authorities or entities, or their respective officers, employees, agents or representatives.

**B.** This Memorandum may be amended, expanded or modified at any time upon the written consent of the parties. It must be reviewed and re-executed within two years of the date of its original execution and every two years thereafter.

**C.** If changes in state or federal law require changes to this Memorandum, the parties shall amend this Memorandum.

**D.** All parties to this Memorandum will communicate fully and openly with each other in order to resolve any problems that may arise in the fulfillment of the terms of this Memorandum.



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Dr. James Hanak

jhanak@palcs.org

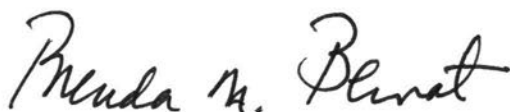
Work: (610) 701-3333, ext. 1111

Cell: (610) 399-9876

Chief School Administrator

Pennsylvania Leadership Charter School

School Entity



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Brenda M. Bernot

Chief of Police

Westtown-East Goshen Police Department

Law Enforcement Authority



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Seth Heiland

sheiland@palcs.org

Work: (610) 701-3333, ext. 1127

Cell: (610) 506-4130

Director of Human Resources

Enterprise Main Office

School Building 1

1332 Enterprise Drive

West Chester, PA 19380

Dr. Karla Johnson

kjohnson11@palcs.org

Work: (610) 701-3333, ext. 1151

Cell: (610) 800-9463

Middle School Principal

Enterprise Main Office

School Building 1

Dr. Karla Johnson

kjohnson11@palcs.org

Work: (610) 701-3333, ext. 1151

Cell: (610) 800-9463

Middle School Principal

Enterprise Main Office

School Building 1

1332 Enterprise Drive

West Chester, PA 19380



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Christopher Stiles

cstiles@palcs.org

Work: (610) 701-3333, ext. 1402

Cell: (610) 314-9391

Building Principal

Advanced Ideas Center (AIC)

School Building 2

1585 Paoli Pike



West Chester, PA 19380

*Christoph C. Steen*

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Michael Logue

[mlogue@palcs.org](mailto:mlogue@palcs.org)

Work: (610) 701-3333, ext. 1143

Cell: (484) 886-6533

Building Principal

PALCS High School

School Building 3

1645 West Chester Pike

West Chester, PA 19382

*Michael Logue*



**PA Leadership Charter School**

1332 Enterprise Drive  
West Chester, PA 19380

**Board Affirmation Statement**

The purpose of this document is for the President of the governing board to affirm that the annual report information is accurate.

**Charter Annual Report Affirmation**

I verify that all information and records in this charter school annual report are complete and accurate.

Affirmed on this 4<sup>th</sup> day of August, 2022

By: *[Signature]* (Signature of Board President)

GARY G. DOUGHERTY (Print Name)

Pennsylvania Leadership Charter School Board of Trustees



**PA Leadership Charter School**

1332 Enterprise Drive  
West Chester, PA 19830

**Charter School Law Affirmation**

Pennsylvania’s first Charter School Law was Act 22 of 1997, 24 P.S. § 17-1701-A et seq., which primarily became effective June 19, 1997, and has subsequently been amended.

The Charter School Law provides for the powers, requirements, and establishment of charter schools. The Charter School Law was passed to provide opportunities to teachers, parents, pupils and community members to establish and maintain schools that operate independently from the existing school district structure as a method to accomplish all of the following: (1) improve pupil learning; (2) increase learning opportunities for all pupils; (3) encourage the use of different and innovative teaching methods; (4) create new professional opportunities for teachers; (5) provide parents and pupils with expanded choices in types of educational opportunities that are available within the public school system; and (6) hold charter schools accountable for meeting measurable academic standards and provide the school with a method to establish accountability systems.

The charter school assures that it will comply with the requirements of the Charter School Law and any provision of law from which the charter school has not been exempted, including Federal laws and regulations governing children with disabilities. The charter school also assures that it will comply with the policies, regulations and procedures of the Pennsylvania Department of Education (Department).

Additional information about charter schools is available on the Pennsylvania Department’s website at: <http://www.education.state.pa.us>.

Affirmed on this 24<sup>th</sup> day of August, 2022

By: [Signature] (Signature of Board President)

GARY G. DOUGHERTY (Print Name)

Pennsylvania Leadership Charter School Board of Trustees



**PA Leadership Charter School**

1332 Enterprise Drive  
West Chester, PA 19830

**Ethics Act Affirmation**

Pennsylvania’s current Public Official and Employee Ethics Act (Ethics Act), Act 93 of 1998, Chapter 11, 65 Pa.C.S. § 1101 et seq., became effective December 14, 1998 and has subsequently been amended.

The Ethics Act provides that public office is a public trust and that any effort to realize personal financial gain through public office other than compensation provided by law is a violation of that trust. The Ethics Act was passed to strengthen the faith and confidence of the people of Pennsylvania in their government. The Pennsylvania State Ethics Commission (Commission) administers and enforces the provisions of the Ethics Acts and provides guidance regarding its requirements.

The regulations of the Commission set forth the procedures applicable to all proceedings before the Commission as well as for the administration of the Statement of Financial Interests filing requirements. See 51 Pa. Code § 11.1 et seq.

The charter school assures that it will comply with the requirements of the Ethics Act and with the policies, regulations and procedures of the Commission. Additional information about the Ethics Act is available on the Commission’s website at: <http://www.ethics.state.pa.us>.

Affirmed on this 4<sup>th</sup> day of August, 2022

By: [Signature] (Signature of Board President)

GARY G. DOUGHERTY (Print Name)

Pennsylvania Leadership Charter School Board of Trustees



**PA Leadership Charter School**

1332 Enterprise Drive  
West Chester, PA 19380

**Charter Annual Background Check Affirmation**

I certify that, as of this date, the above referenced LEA is in compliance with all applicable provisions of Sections 111 and 111.1 of the Public School Code of 1949.

Affirmed on this 24<sup>th</sup> day of August, 2022

By: [Signature] (Signature of Board President)

GARY G DOUGHERTY (Print Name)

Pennsylvania Leadership Charter School Board of Trustees





**PA Leadership Charter School**

1332 Enterprise Drive  
West Chester, PA 19330

**Charter Annual Administrative Certification Affirmation**

All public school principals, including charter and cyber charter school principals, are subject to the applicable certification requirements of the Public School Code ( 24 P.S. § 11-1109) as well as any Act 45 continuing education and Pennsylvania Inspired Leaders (PIL) requirements. In keeping with the intent of section 1109, any person who devotes half or more of their time to supervision or administration in a public school, without an identified principal, is serving as the "principal" of the school regardless of the locally titled position (i.e., school director, head teacher, etc.). Such individuals must hold a valid administrative certificate and comply with all applicable Act 45 and PIL requirements. In addition, the public school should properly identify the individual as a principal in PIMS/PERMS regardless of the local title utilized.

The Charter School assures that the Public School Code ( 24 P.S. § 11-1109) as well as any Act 45 continuing education and Pennsylvania Inspired Leaders (PIL) requirements are met as outlined above.

Affirmed on this 21<sup>th</sup> day of August, 2022

By: [Signature] (Signature of Board President)

GARY G DOUGHERTY (Print Name)

Pennsylvania Leadership Charter School Board of Trustees



**PA Leadership Charter School**

1332 Enterprise Drive  
West Chester, PA 19830

**Identification of Students with Specific Learning Disabilities using Response to Intervention Assurance/Affirmation**

If the Charter School has received approval from PDE to utilize a Response to Intervention method to identify students with Specific Learning Disabilities, the Charter School will assure implementation with fidelity for the duration of this plan.

Affirmed on this 14<sup>th</sup> day of August, 2022

By: [Signature] (Signature of Board President)

GARY G DOUGHERTY (Print Name)

Pennsylvania Leadership Charter School Board of Trustees