

PENNSYLVANIA DISTANCE LEARNING CS

Charter School Annual Report | 2022 - 2023

School Profile

LEA Name

Pennsylvania Distance Learning CS

AUN

115220003

Address 1

2605 Nicholson Road

Address 2

Suite 4100

City

Sewickley

State

PA

Zip Code

15143

Chief Administrator Name

Dr Michael Leitera

Chief Administrator Email

michael.leitera@padistance.org

Chief Administrator Phone

(888)997-3352-114

Extension**Charter School Principal****Principal Name**

Kelly Crooks

Principal Email

Kelly.Crooks@PAdistance.org

Principal Phone

888-997-3352

Extension

159

Authorizing District(s)

Cyber Charter - PDE is Authorizing Entity (CHECKED)

Upload Current Charter (PDF only)

Charter renewal 2015-2020.pdf

Governance and Staff

Board of Trustees Members

Name	Office	Check if New Member
John Marous	President	
William Donahue	Vice-President/Secretary	
Stephen Catanzarite	member	

Explanation of Board of Trustees Changes

PDE, through our ongoing discussions for charter renewal, required that the Board expand its number of Trustees. Mr. Catanzarite was recruited for Board service due to his experience in schools, and in particular, charter schools.

Board of Trustees Meeting Schedule

Location	Date	Time
2605 Nicholson Road, Suite 4100, Sewickley, PA 15143	2022-09-20	4:00 PM
2605 Nicholson Road, Suite 4100, Sewickley, PA 15143	2022-12-05	4:00 PM
2605 Nicholson Road, Suite 4100, Sewickley, PA 15143	2023-03-13	4:00 PM
2605 Nicholson Road, Suite 4100, Sewickley, PA 15143	2023-05-09	2:00 PM
2605 Nicholson Road, Suite 4100, Sewickley, PA 15143	2023-06-26	3:00 PM

Upload Board Minutes

Board Meeting Minutes SY22-23.pdf

Leadership Team

Name	Title/Position	Check if New Member
Michael Leitera	Chief Executive Officer	(CHECKED)
Kelly Crooks	Chief Academic Officer	
Dean Pappaterra	Other	
Nicholas Kocuba	Other	
Stephanie Faith	Director of Special Education	
Charles Mort	Principal	
Kimberly Crandall	Principal	
Aubrey Ploesch	Principal	
Patricia Rossetti	Chief Executive Officer	

Explanation of Leadership Changes

Mrs. Patricia Rossetti's retired this school year, Upon her retirement, Dr. Michael Leitera assumed the role of CEO.

Upload of Professional Staff Member Roster (PDE-414 Form)

PDE 414.xls

Quality of Teaching and Other Staff

	# of Staff per Category	# of Staff Appropriately Certified	# of Staff Promoted	# of Staff Transferred	# of Staff Terminated	# of Staff Contracted for Following Year
Chief Executive Officer	2	2	0	0	0	2
Chief Administrative Officer	1	1	0	0	0	1
Principal	3	3	0	0	0	3
Assistant Principal	0	0	0	0	0	0
Classroom Teacher (including Master Teachers)	61	61	0	0	0	61
Specialty Teacher (including Master Teachers)	29	29	0	0	0	29
Special Education Teacher (including Master Teachers)	24	24	0	0	0	24

Special Education Coordinator	1	1	0	0	0	1
Counselor	11	11	0	0	0	11
Psychologist	0	0	0	0	0	0
School Nurse	2	2	0	0	0	2
IT Director	0	0	0	0	0	0
Business Administrator	0	0	0	0	0	0
ISD, Curriculum Developers, Tech Support	0	0	0	0	0	0
HR Manager	1	1	0	0	0	1
Student Support Manager, Facilities Manager	1	1	0	0	0	1
Business Office, Administrative Support Staff, Teaching Assistants	22	0	0	0	0	22
Other	14					
Totals	172	136	0	0	0	158

Explanation of Substantial Differences

Additional members of the community engagement team Staff transition

Fiscal Matters

Major Fundraising Activities

There were no fundraising activities for the 2022-2023 school year. There are no plans for fundraising activities for the 2023-2024 school year.

Fiscal Solvency Policies

The school did not make any changes to procedures during the 2022-23 school year. The school board adopts an annual budget in June prior to the upcoming fiscal year. All purchasing and expense allocation throughout the fiscal year must align with the budget. The administration and board monitors fiscal activity, as related to the annual budget, on a monthly basis. The monthly financial reporting includes the following monthly reports: - Comparative Balance Sheets with dates as of the last fiscal year end and the most recent month end - Budget versus Actual for the month period ending as of the most recent month end - End of year projection versus the annual budget - Accounts Receivable as of the most recent month end

Accounting System

The school continues to contract with Charter Choices, Inc. to provide business services to the school including accounts payable, receivable, and financial reporting. Charter Choices is currently switching softwares to the Sage Intacct system and naming conventions/account designations to improve accounting operations.

Preliminary Statements of Revenues, Expenditures & Fund Balances

Board approved draft budget preliminary Revenues are 25,035,625 and Expenditures are 24,758,789. the total fund balance on the June 30, 2022 audit report was \$12,778,703; the projected change in fund balance for the current fiscal year is approximately \$1,300,000; the projected operating expenditures for the current fiscal year is approximately \$24,600,000; the fund balance policy strives to maintain unassigned fund balances between 5% and 10% of operating expenditures; PA Distance hereby commits an additional \$1,700,643 of the General Fund balance for a total committed balance of \$11,250,000. AND BE IT RESOLVED that PA DISTANCE Board of Trustees reassigns the previously committed and assigns the newly committed General Fund Balance as follows: • \$2,723,333 is committed to future costs associated with the increasing costs of the PSERS retirement program. This balance covers the net Deferred Outflows and Deferred Inflows of Resources liability and is approximately 33% of the total GASB 68 pension liability reported on the June 30, 2022 audit report. • \$7,509,469 is committed for future operational needs. • \$1,017,198 is committed as collateral for the letter-of-credit required under the facility lease *adopted the 26th day of June, 2023.

Upload Statements of Revenues, Expenditures & Fund Balances

Financial Audit Basics

Audit Firm

HBK CPAs & Consultants

Date of Last Audit

2022-12-15

Fiscal Year Last Audited

2021-2022

Explanation of the Report

Hill Barth & King, CPAs & Consultants conducted an annual independent audit of PA Distance Learning Charter School in accordance with Government Auditing Standards. The auditor's report on compliance for each major program and on internal control over compliance required by the Uniform Guidance found PA Distance compliant with the types of compliance requirements described in the OMB Compliance Supplement. HBK did not identify any deficiencies in internal controls over compliance. In addition, PA Distance complied, in all material respects, with the types of compliance requirements resulting in a reasonable basis for HBK's opinion of compliance for each major federal program.

Upload Financial Audit Document(s)

PA Distance Learning CS Financial Statement 06-30-2022.pdf

Financial Audit Citations

Financial Audit Citations Description	Response
No citations for the 22-23 audit	There were no responses as there are no citations resulting from the 2022-2023 audit.

Federal Programs Consolidated Review

Federal Programs Consolidated Review Document(s)

No

Special Education

Special Education Support Services

Position Title	Building(s) Name and Location for Charter Schools	Caseload	Low Age	High Age
Special Education Coordinator	PA Distance Learning Charter School	324	5	21
School Psychologist	PA Distance Learning Charter School	324	5	21
Speech Language Pathologist	PA Distance Learning Charter School	39	5	18
Occupational Therapist	PA Distance Learning Charter School	38	5	19

Special Education Contracted Services

Title	Amt. of Time per Week in Days or Hours	Operator	# of Students
BCBA	4.5 hours per week	Connecting the Pieces	4
BSC	32 hours per week	Connecting the Pieces	20
BSC	3.75 hours per week	Presence Learning	4
BSC	34.25 hours per week	Soaring Abilities	9
BSC	34.25 hours per week	Therapy Source	21
Counseling	6.75 hours per week	Connecting the Pieces	9
Counseling	11.75 hours per week	Presence Learning	12

Counseling	4.75 hours per week	Soaring Abilities	4
Counseling	12.75 hours per week	Therapy Source	13
Audiologist	45 min one time a year	Allegheny Intermediate Unit 3	1
Deaf and Hard of Hearing Teacher	45 min a week	Allegheny Intermediate Unit 3	2
Explicit Language program	5 hours per week	Therapy Source	1
Learning Coach	49 hours per week	Connecting the Pieces	14
Learning Coach	116.5 hours per week	Therapy Source	31
Occupational Therapist	3.5 hours per week	Therapy Source	6
Physical Therapist	3.25 hours per week	Therapy Source	6
Reading Specialist	11.5 hours per week	Therapy Source	6
Speech Language Pathologist	3.5 hours per week	Kaleidoscope	5
Speech Language Pathologist	18 hours per week	Presence Learning	21
Speech Language Pathologist	34.75 hours per week	Therapy Source	36

Social Skills	5.25 hours per week	Therapy Source	10
Special Education Teacher	10 hours per week	Soaring Abilities	1
Transportation	5 hours per week	DMJ Transportation	2
Transportation	5 hours per week	CPC Management/Germantown Cab	1
Psychological Testing	128 hours per week	Delta T	64

Special Education Cyclical Monitoring

Date of Last Special Education Cyclical Monitoring

2017-12-04

Upload Link to Report (Optional)

Special Education Cyclical Monitoring Report

Special Education BSE Compliance Monitoring Report 01152018.pdf

Administrative Procedures for Internal Controls of IEP Development

Pre-IEP and IEP Meeting Process 2022v1.3 (1).pdf

After the IEP Meeting 2022v1.2.pdf

SOP Sending out IEP-ER_RR input forms.docx

Special Education Personnel Development

Autism

Description of Training			
Function-Based Support for Students with Autism			
Lead Person/Position		Year of Training	
Christopher Borgmeier, Ph.D		2023	
Hours Per Training	Number of Sessions	Provider	Who Participated (Audience)
1	1	2023 PDE Conference	SE Coordinator, Behavior Specialist, SE Emotional Support Teacher

Training Date Complete

2023-03-02

Function-Based Support for Students with Autism.pptx.pdf

Reminder of your upcoming training event_ 2023 Pennsylvania Department of Education (In-Person) Conference.eml

BehaviorSupport

Description of Training			
Training School-Level Behavior Specialists: Using Basic FBA to BIP to Build Capacity			
Lead Person/Position		Year of Training	
Christopher Borgmeier, Ph.D		2023	
Hours Per Training	Number of Sessions	Provider	Who Participated (Audience)
1	1	2023 PDE Conference	Behavior Specialist, SE Coordinator

Training Date Complete

2023-03-03

Training School-Level Behavior Specialists.pptx.pdf

Confirmation of your upcoming conference_ 2023 Pennsylvania Department of Education (In-Person) Conference (1).eml

Paraprofessional

Training not offered.

Transition

Description of Training			
Preparing for Cyclical Monitoring: A Focus on Secondary Transition Planning and IEP Development			
Lead Person/Position		Year of Training	
PaTTAN		2022	
Hours Per Training	Number of Sessions	Provider	Who Participated (Audience)
6	9	Schoology	All transition-aged SE teachers, Special Education Coordinator, Behavioral Specialist, CEW Coordinator, Administration

Training Date Complete

2023-02-28

PA DISTANCE CS Schoology Roster Confirmation.eml

_Overview of NEW IND 13 Initiative.pdf

Training Date Complete

2022-08-30

IEP Transition Services.pdf

22-23 IEP Transition Services Training-Verification of Completion (Responses) - Form Responses 1.pdf

ScienceofLiteracy

Description of Training			
Read 180 Training for Literacy Interventions			
Lead Person/Position		Year of Training	
Dr. Michele Burns/HMH Trainer		2022	
Hours Per Training	Number of Sessions	Provider	Who Participated (Audience)
2.5	6	HMH Professional Services	Reading Specialists, SE Teachers

Training Date Complete

2022-08-30

Pennsylvania Distance Learning Read 180 Getting Started.docx

Read 180 Training 22-23 Verification of Completion (Responses).xlsx

ParentTraining

Description of Training			
Special Education Parent Monthly Workshop Wednesday - K-12			
Lead Person/Position		Year of Training	
Stephanie Faith/SE Coordinator		2023	
Hours Per Training	Number of Sessions	Provider	Who Participated (Audience)
.5	9	PA Distance Learning Charter School	SE Teachers, Parents

Training Date Complete

2023-05-24

22-23 Special Ed K-12 Workshop Wednesday Schedule - Parents - Sheet1 (1)_2a4b46ad.pdf

Oct 19, 2022 Activity Log_ Special Education Workshop Wednesday - tomorrow, 10_19_22_c57233b0.eml

Nov 09, 2022 Activity Log_ Special Education Parent_Guardian Workshop Wednesday - November 9!_8166f300.eml

Dec 13, 2022 Activity Log_ Special Education Parent_Guardian Workshop Wednesday - this Wednesday, Dec 14!_51401ed2.eml

Feb 22, 2023 Activity Log_ Monthly Special Education Workshop Wednesday! This Wednesday, 2_22_23!_11027f82.eml

Mar 23, 2023 Activity Log_ Change of time for Special Education Workshop Wednesday - today at 11_30!!_1818c3d4.eml

May 24, 2023 Activity Log_ Special Education families - Workshop Wednesday, May 24!!_338ec823.eml

IEPDevelopment

Description of Training			
Special Education and 504 Overview Updates			
Lead Person/Position		Year of Training	
Nicole D. Snyder/ School Counsel		2022	
Hours Per Training	Number of Sessions	Provider	Who Participated (Audience)
2	1	McKenna Snyder, LLC	Administrators

Training Date Complete

2022-10-19

10.19.22 PA Distance Training Presentation - FINAL (2).PPTX

SE_ 10.19.22 PA Distance Training Presentation - FINAL.PPTX (1).eml

Training Date Complete

2023-05-12

PaTTAN Important Conference Reminder - 2023 AAC Unleashed_ Empowering Diverse Communicators.eml

PaTTAN Important Conference Reminder - 2023 AAC Unleashed_ Empowering Diverse Communicators.eml

Training Date Complete

2023-04-12

22-23 Special Education Meeting_ Collaboration Time Rolling Agenda Template.pdf

22-23 Special Education Meeting_ Collaboration Time Rolling Agenda Template.pdf

Special Education Program Profile

FTE ID	Classroom Location	Full-time or Part-time Position?	Revised
Teacher 21	Secondary	Full-time (1.0)	07/18/2023 04:00 PM

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Itinerant (20% or Less)		9
Identify Classroom	Classroom Location	Age Range
School District	Secondary	15 to 18
Age Range Justification		FTE %
		0.18

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		

Learning Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		7
Identify Classroom	Classroom Location	Age Range
School District	Secondary	16 to 19
Age Range Justification		FTE %
		0.35

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Emotional Support		
Support Sub-Type		
Emotional Support		
Level of Support		Case Load
Itinerant (20% or Less)		1
Identify Classroom	Classroom Location	Age Range
School District	Secondary	16 to 16
Age Range Justification		FTE %
		0.02

FTE ID	Classroom Location	Full-time or Part-time Position?	Revised
Teacher 20	Secondary	Full-time (1.0)	07/18/2023 03:57 PM

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Itinerant (20% or Less)		10
Identify Classroom	Classroom Location	Age Range
School District	Secondary	16 to 21
Age Range Justification		FTE %
HS Special Ed with Graduation Recovery		0.2

Building Name		
Pennsylvania Distance Learning CS		

Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		5
Identify Classroom	Classroom Location	Age Range
School District	Secondary	15 to 18
Age Range Justification		FTE %
		0.25

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Emotional Support		
Support Sub-Type		
Emotional Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		1
Identify Classroom	Classroom Location	Age Range
School District	Secondary	17 to 17
Age Range Justification		FTE %
		0.05

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Emotional Support		
Support Sub-Type		
Emotional Support		
Level of Support		Case Load
Itinerant (20% or Less)		3
Identify Classroom	Classroom Location	Age Range
School District	Secondary	17 to 19
Age Range Justification		FTE %
		0.06

FTE ID	Classroom Location	Full-time or Part-time Position?	Revised
Teacher 19	Secondary	Full-time (1.0)	07/18/2023 03:51 PM

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Itinerant (20% or Less)		10
Identify Classroom	Classroom Location	Age Range
School District	Secondary	15 to 18
Age Range Justification		FTE %
		0.2

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		5
Identify Classroom	Classroom Location	Age Range
School District	Secondary	15 to 18
Age Range Justification		FTE %
		0.25

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Emotional Support		
Support Sub-Type		
Emotional Support		
Level of Support		Case Load
Itinerant (20% or Less)		3
Identify Classroom	Classroom Location	Age Range
School District	Secondary	16 to 18
Age Range Justification		FTE %
		0.06

FTE ID	Classroom Location	Full-time or Part-time Position?	Revised
Teacher 18	Secondary	Full-time (1.0)	07/18/2023 03:46 PM

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Itinerant (20% or Less)		8
Identify Classroom	Classroom Location	Age Range
School District	Secondary	15 to 18
Age Range Justification		FTE %
		0.16

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Autistic Support		
Support Sub-Type		
Autistic Support		
Level of Support		Case Load
Itinerant (20% or Less)		4
Identify Classroom	Classroom Location	Age Range
School District	Secondary	15 to 18
Age Range Justification		FTE %
		0.33

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Emotional Support		
Support Sub-Type		
Emotional Support		
Level of Support		Case Load
Itinerant (20% or Less)		1
Identify Classroom	Classroom Location	Age Range
School District	Secondary	18 to 18
Age Range Justification		FTE %
		0.02

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		6
Identify Classroom	Classroom Location	Age Range
School District	Secondary	15 to 18
Age Range Justification		FTE %
		0.3

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Speech And Language Support		
Support Sub-Type		
Speech And Language Support		
Level of Support		Case Load
Itinerant (20% or Less)		1
Identify Classroom	Classroom Location	Age Range
School District	Secondary	15 to 15
Age Range Justification		FTE %
		0.02

FTE ID	Classroom Location	Full-time or Part-time Position?	Revised
Teacher 17	Secondary	Full-time (1.0)	07/18/2023 03:32 PM

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Itinerant (20% or Less)		14
Identify Classroom	Classroom Location	Age Range
School District	Secondary	15 to 18

Age Range Justification	FTE %
	0.28

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		7
Identify Classroom	Classroom Location	Age Range
School District	Secondary	15 to 18
Age Range Justification		FTE %
		0.35

FTE ID	Classroom Location	Full-time or Part-time Position?	Revised
Teacher 16	Elementary	Full-time (1.0)	07/18/2023 04:01 PM

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Speech And Language Support		
Support Sub-Type		
Speech And Language Support		
Level of Support		Case Load
Itinerant (20% or Less)		9
Identify Classroom	Classroom Location	Age Range
School District	Elementary	5 to 8
Age Range Justification		FTE %
		0.14

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load

Itinerant (20% or Less)		10
Identify Classroom	Classroom Location	Age Range
School District	Elementary	5 to 8
Age Range Justification		FTE %
		0.2

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		3
Identify Classroom	Classroom Location	Age Range
School District	Elementary	5 to 8
Age Range Justification		FTE %
		0.15

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Emotional Support		
Support Sub-Type		
Emotional Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		1
Identify Classroom	Classroom Location	Age Range
School District	Elementary	7 to 7
Age Range Justification		FTE %
		0.05

FTE ID	Classroom Location	Full-time or Part-time Position?	Revised
Teacher 15	Secondary	Full-time (1.0)	07/18/2023 03:27 PM

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		

Support Sub-Type		
Learning Support		
Level of Support		Case Load
Itinerant (20% or Less)		11
Identify Classroom	Classroom Location	Age Range
School District	Secondary	15 to 18
Age Range Justification		FTE %
		0.22

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		10
Identify Classroom	Classroom Location	Age Range
School District	Secondary	15 to 18
Age Range Justification		FTE %
		0.5

FTE ID	Classroom Location	Full-time or Part-time Position?	Revised
Teacher 14	Secondary	Full-time (1.0)	07/18/2023 03:23 PM

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Itinerant (20% or Less)		5
Identify Classroom	Classroom Location	Age Range
School District	Secondary	10 to 12
Age Range Justification		FTE %
		0.1

Building Name

Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		2
Identify Classroom	Classroom Location	Age Range
School District	Secondary	11 to 12
Age Range Justification		FTE %
		0.1

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Emotional Support		
Support Sub-Type		
Emotional Support		
Level of Support		Case Load
Itinerant (20% or Less)		3
Identify Classroom	Classroom Location	Age Range
School District	Secondary	10 to 12
Age Range Justification		FTE %
		0.06

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Emotional Support		
Support Sub-Type		
Emotional Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		1
Identify Classroom	Classroom Location	Age Range
School District	Secondary	11 to 11
Age Range Justification		FTE %
		0.05

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Autistic Support		
Support Sub-Type		

Autistic Support		
Level of Support		Case Load
Itinerant (20% or Less)		1
Identify Classroom	Classroom Location	Age Range
School District	Secondary	12 to 12
Age Range Justification		FTE %
		0.08

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Autistic Support		
Support Sub-Type		
Autistic Support		
Level of Support		Case Load
Full-Time (80% or More)		1
Identify Classroom	Classroom Location	Age Range
School District	Secondary	12 to 12
Age Range Justification		FTE %
		0.12

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Speech And Language Support		
Support Sub-Type		
Speech And Language Support		
Level of Support		Case Load
Itinerant (20% or Less)		1
Identify Classroom	Classroom Location	Age Range
Intermediate Unit	Secondary	10 to 12
Age Range Justification		FTE %
		0.02

FTE ID	Classroom Location	Full-time or Part-time Position?	Revised
Teacher 13	Elementary	Full-time (1.0)	07/18/2023 03:16 PM

Building Name		
Pennsylvania Distance Learning CS		

Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Itinerant (20% or Less)		4
Identify Classroom	Classroom Location	Age Range
School District	Elementary	10 to 12
Age Range Justification		FTE %
		0.08

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Speech And Language Support		
Support Sub-Type		
Speech And Language Support		
Level of Support		Case Load
Itinerant (20% or Less)		2
Identify Classroom	Classroom Location	Age Range
School District	Elementary	10 to 11
Age Range Justification		FTE %
		0.03

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		8
Identify Classroom	Classroom Location	Age Range
School District	Elementary	10 to 12
Age Range Justification		FTE %
		0.4

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Emotional Support		
Support Sub-Type		
Emotional Support		

Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		1
Identify Classroom	Classroom Location	Age Range
School District	Elementary	10 to 10
Age Range Justification		FTE %
		0.05

FTE ID	Classroom Location	Full-time or Part-time Position?	Revised
Teacher 12	Secondary	Full-time (1.0)	07/18/2023 03:11 PM

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Itinerant (20% or Less)		16
Identify Classroom	Classroom Location	Age Range
School District	Secondary	12 to 14
Age Range Justification		FTE %
		0.32

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		1
Identify Classroom	Classroom Location	Age Range
School District	Secondary	13 to 13
Age Range Justification		FTE %
		0.05

Building Name		
Pennsylvania Distance Learning CS		
Support Type		

Emotional Support		
Support Sub-Type		
Emotional Support		
Level of Support		Case Load
Itinerant (20% or Less)		1
Identify Classroom	Classroom Location	Age Range
School District	Secondary	12 to 12
Age Range Justification		FTE %
		0.02

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Emotional Support		
Support Sub-Type		
Emotional Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		2
Identify Classroom	Classroom Location	Age Range
School District	Secondary	12 to 13
Age Range Justification		FTE %
		0.1

FTE ID	Classroom Location	Full-time or Part-time Position?	Revised
Teacher 11	Elementary	Full-time (1.0)	07/18/2023 03:06 PM

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Life Skills Support		
Support Sub-Type		
Life Skills Support (Grades K-6)		
Level of Support		Case Load
Full-Time (80% or More)		4
Identify Classroom	Classroom Location	Age Range
School District	Elementary	5 to 9
Age Range Justification		FTE %
Life Skills Classroom		0.33

FTE ID	Classroom Location	Full-time or Part-time Position?	Revised
Teacher 10	Elementary	Full-time (1.0)	07/18/2023 03:05 PM

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Itinerant (20% or Less)		9
Identify Classroom	Classroom Location	Age Range
School District	Elementary	7 to 9
Age Range Justification		FTE %
		0.18

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Speech And Language Support		
Support Sub-Type		
Speech And Language Support		
Level of Support		Case Load
Itinerant (20% or Less)		7
Identify Classroom	Classroom Location	Age Range
School District	Elementary	7 to 10
Age Range Justification		FTE %
		0.11

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Deaf And Hearing Impaired Support		
Support Sub-Type		
Deaf And Hearing Impaired Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		1
Identify Classroom	Classroom Location	Age Range

School District	Elementary	10 to 10
Age Range Justification		FTE %
		0.07

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		6
Identify Classroom	Classroom Location	Age Range
School District	Elementary	7 to 9
Age Range Justification		FTE %
		0.3

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Autistic Support		
Support Sub-Type		
Autistic Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		1
Identify Classroom	Classroom Location	Age Range
School District	Elementary	11 to 11
Age Range Justification		FTE %
		0.12

FTE ID	Classroom Location	Full-time or Part-time Position?	Revised
Teacher 9	Elementary	Full-time (1.0)	07/18/2023 03:01 PM

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Speech And Language Support		
Support Sub-Type		
Speech And Language Support		

Level of Support		Case Load
Itinerant (20% or Less)		5
Identify Classroom	Classroom Location	Age Range
School District	Elementary	9 to 11
Age Range Justification		FTE %
		0.08

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Itinerant (20% or Less)		6
Identify Classroom	Classroom Location	Age Range
School District	Elementary	9 to 11
Age Range Justification		FTE %
		0.12

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Autistic Support		
Support Sub-Type		
Autistic Support		
Level of Support		Case Load
Itinerant (20% or Less)		2
Identify Classroom	Classroom Location	Age Range
School District	Elementary	10 to 11
Age Range Justification		FTE %
		0.17

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Autistic Support		
Support Sub-Type		
Autistic Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		1
Identify Classroom	Classroom Location	Age Range
School District	Elementary	11 to 11

Age Range Justification	FTE %
	0.12

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		3
Identify Classroom	Classroom Location	Age Range
School District	Elementary	10 to 11
Age Range Justification		FTE %
		0.15

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Emotional Support		
Support Sub-Type		
Emotional Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		1
Identify Classroom	Classroom Location	Age Range
School District	Elementary	10 to 10
Age Range Justification		FTE %
		0.05

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Emotional Support		
Support Sub-Type		
Emotional Support		
Level of Support		Case Load
Itinerant (20% or Less)		1
Identify Classroom	Classroom Location	Age Range
School District	Elementary	11 to 11
Age Range Justification		FTE %
		0.02

FTE ID	Classroom Location	Full-time or Part-time Position?	Revised
Teacher 8	Secondary	Full-time (1.0)	07/18/2023 02:52 PM

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Life Skills Support		
Support Sub-Type		
Life Skills Support (Grades 7-12)		
Level of Support		Case Load
Full-Time (80% or More)		6
Identify Classroom	Classroom Location	Age Range
School District	Secondary	14 to 18
Age Range Justification		FTE %
Life Skills Classroom HS		0.4

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Life Skills Support		
Support Sub-Type		
Life Skills Support (Grades 7-12)		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		5
Identify Classroom	Classroom Location	Age Range
School District	Secondary	14 to 19
Age Range Justification		FTE %
Life Skills HS Classroom		0.25

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Life Skills Support		
Support Sub-Type		
Life Skills Support (Grades 7-12)		
Level of Support		Case Load
Itinerant (20% or Less)		2
Identify Classroom	Classroom Location	Age Range
School District	Secondary	17 to 19
Age Range Justification		FTE %
		0.1

FTE ID	Classroom Location	Full-time or Part-time Position?	Revised
Teacher 7	Secondary	Full-time (1.0)	07/18/2023 02:49 PM

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Itinerant (20% or Less)		6
Identify Classroom	Classroom Location	Age Range
School District	Secondary	15 to 18
Age Range Justification		FTE %
		0.12

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Speech And Language Support		
Support Sub-Type		
Speech And Language Support		
Level of Support		Case Load
Itinerant (20% or Less)		1
Identify Classroom	Classroom Location	Age Range
School District	Secondary	17 to 17
Age Range Justification		FTE %
		0.02

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		6
Identify Classroom	Classroom Location	Age Range

School District	Secondary	15 to 18
Age Range Justification		FTE %
		0.3

FTE ID	Classroom Location	Full-time or Part-time Position?	Revised
Teacher 6	Secondary	Full-time (1.0)	07/18/2023 02:46 PM

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Autistic Support		
Support Sub-Type		
Autistic Support		
Level of Support		Case Load
Full-Time (80% or More)		2
Identify Classroom	Classroom Location	Age Range
Intermediate Unit	Secondary	14 to 16
Age Range Justification		FTE %
		0.25

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Emotional Support		
Support Sub-Type		
Emotional Support		
Level of Support		Case Load
Full-Time (80% or More)		1
Identify Classroom	Classroom Location	Age Range
Intermediate Unit	Secondary	11 to 11
Age Range Justification		FTE %
		0.08

FTE ID	Classroom Location	Full-time or Part-time Position?	Revised
Teacher 5	Secondary	Full-time (1.0)	07/18/2023 02:45 PM

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Itinerant (20% or Less)		7
Identify Classroom	Classroom Location	Age Range
School District	Secondary	11 to 14
Age Range Justification		FTE %
		0.14

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		6
Identify Classroom	Classroom Location	Age Range
School District	Secondary	12 to 15
Age Range Justification		FTE %
		0.3

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Speech And Language Support		
Support Sub-Type		
Speech And Language Support		
Level of Support		Case Load
Itinerant (20% or Less)		1
Identify Classroom	Classroom Location	Age Range
School District	Secondary	12 to 12
Age Range Justification		FTE %
		0.02

Building Name		
Pennsylvania Distance Learning CS		
Support Type		

Deaf And Hearing Impaired Support		
Support Sub-Type		
Deaf And Hearing Impaired Support		
Level of Support		Case Load
Itinerant (20% or Less)		1
Identify Classroom	Classroom Location	Age Range
School District	Secondary	12 to 12
Age Range Justification		FTE %
		0.02

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Emotional Support		
Support Sub-Type		
Emotional Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		1
Identify Classroom	Classroom Location	Age Range
School District	Secondary	13 to 13
Age Range Justification		FTE %
		0.05

FTE ID	Classroom Location	Full-time or Part-time Position?	Revised
Teacher 4	Secondary	Full-time (1.0)	07/18/2023 02:40 PM

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		
Support Sub-Type		
Learning Support		
Level of Support		Case Load
Itinerant (20% or Less)		10
Identify Classroom	Classroom Location	Age Range
School District	Secondary	12 to 15
Age Range Justification		FTE %
		0.2

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Speech And Language Support		
Support Sub-Type		
Speech And Language Support		
Level of Support		Case Load
Itinerant (20% or Less)		1
Identify Classroom	Classroom Location	Age Range
School District	Secondary	15 to 15
Age Range Justification		FTE %
		0.02

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Life Skills Support		
Support Sub-Type		
Life Skills Support (Grades 7-12)		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		3
Identify Classroom	Classroom Location	Age Range
School District	Secondary	14 to 16
Age Range Justification		FTE %
		0.15

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Autistic Support		
Support Sub-Type		
Autistic Support		
Level of Support		Case Load
Itinerant (20% or Less)		1
Identify Classroom	Classroom Location	Age Range
School District	Secondary	15 to 15
Age Range Justification		FTE %
		0.08

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Autistic Support		

Support Sub-Type		
Autistic Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		1
Identify Classroom	Classroom Location	Age Range
School District	Secondary	15 to 15
Age Range Justification		FTE %
		0.12

FTE ID	Classroom Location	Full-time or Part-time Position?	Revised
Teacher 3	Multiple	Full-time (1.0)	07/18/2023 02:35 PM

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Life Skills Support		
Support Sub-Type		
Life Skills Support (Grades K-6)		
Level of Support		Case Load
Full-Time (80% or More)		4
Identify Classroom	Classroom Location	Age Range
School District	Multiple	12 to 15
Age Range Justification		FTE %
		0.33

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Life Skills Support		
Support Sub-Type		
Life Skills Support (Grades 7-12)		
Level of Support		Case Load
Full-Time (80% or More)		4
Identify Classroom	Classroom Location	Age Range
School District	Multiple	14 to 16
Age Range Justification		FTE %
		0.27

FTE ID	Classroom Location	Full-time or Part-time Position?	Revised
Teacher 2	Secondary	Full-time (1.0)	07/18/2023 02:28 PM

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Emotional Support		
Support Sub-Type		
Emotional Support		
Level of Support		Case Load
Itinerant (20% or Less)		12
Identify Classroom	Classroom Location	Age Range
School District	Secondary	14 to 18
Age Range Justification		FTE %
Emotional Support Classroom		0.24

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Emotional Support		
Support Sub-Type		
Emotional Support		
Level of Support		Case Load
Supplemental (Less Than 80% but More Than 20%)		6
Identify Classroom	Classroom Location	Age Range
School District	Secondary	14 to 18
Age Range Justification		FTE %
Emotional Support Classroom		0.3

FTE ID	Classroom Location	Full-time or Part-time Position?	Revised
Teacher 1	Secondary	Full-time (1.0)	07/18/2023 02:26 PM

Building Name		
Pennsylvania Distance Learning CS		
Support Type		
Learning Support		

Support Sub-Type		
Learning Support		
Level of Support		Case Load
Itinerant (20% or Less)		6
Identify Classroom	Classroom Location	Age Range
School District	Secondary	16 to 21
Age Range Justification		FTE %
Graduation Recovery program		0.12

Facilities and Agreements

Fixed assets acquired by the Charter School during the past fiscal year

Fixed Asset Description	Location	Capital Expenditure
Furniture and Fixtures	2605 Nicholson Road, Suite 4100, Sewickley, PA 15143	\$6,717.00
Equipment -Student Computers	Distributed to homes of students with remaining inventory at 2605 Nicholson Road, Suite 4100, Sewickley, PA 15143	\$38,741.00

Facility Plans and Other Capital Needs

The Charter School's plan for future facility development and the rationale for the various components of the plan

The charter school does not have any future facility development plans at this time.

Memorandum of Understanding

Organization	Purpose
Franklin Park Police	School Safety
Allegheny County Department of Human Services, Office of Children, Youth, and Families	Foster Care and Transportation
DAO of Philadelphia - Project GO	Attendance/Truancy
Allegheny Intermediate Unit AIU	Comprehensive Services Agreement
Allegheny Intermediate Unit Title III	Title III services and support

Upload of Memorandum of Understanding Document(s)

2023 MOU Franklin Park PD-PDLCS 2023-07-01 (1).pdf

Allegheny County Foster Care MOU and Transportation Plan Final 06162017 (1).pdf

2022-23 MOU -AIU Title III Consortium.pdf

2022 - 2023 Project Go MOU_PA Distance Learning.pdf

PA Distance Learners CS AIU Comprehensive Services Agreement 2023-2024 FULLY EXECUTED.pdf

Articulation Agreements

Partnering Institution

Lackawanna College

Agreement Type

Program/Course Area

Core Academic Subjects

Upload Articulation Agreement

22-23 Lackawanna Agreement.pdf

Partnering Institution

Luzerne County Community College

Agreement Type

Program/Course Area

Early College/Core Academic Subjects

Upload Articulation Agreement

MOU Luzerne CC-Early College Program 2020 - 2025 08262022.pdf

Management Survey

Charter School Management Survey

Charter School Name

Pennsylvania Distance Learning CS

Point of Contact Name

Michael Leitera

Point of Contact Telephone Number

724-719-6648

Extension

114

Point of Contact Email

michael.leitera@padistance.org

Management Organization Information

As of the start of the 2021/2022 school year, has the Charter School had a Management Organization (i.e., a separate legal entity that contracts with one or more charter schools to manage, operate, and oversee the schools OR that holds charters to operate two or more charter schools)?

No

Signatures and Affirmations

Upload Board Affirmation Statement

Board Affirmation Statement 2022-2023.pdf

Date of Approval

2023-07-21

Charter School Annual Report Affirmation

Board President

Board President Signature for Charter Annual Report Affirmation can be found in the Uploaded Board Affirmation Statement.

Chief Executive Officer

Dr. Michael Leitera

Charter School Law Affirmation

Board President

Board President Signature for Charter Annual Report Affirmation can be found in the Uploaded Board Affirmation Statement.

Chief Executive Officer

Dr. Michael Leitera

Ethics Act Affirmation

Board President

Board President Signature for Charter Annual Report Affirmation can be found in the Uploaded Board Affirmation Statement.

Chief Executive Officer

Dr. Michael Leitera

Charter School Annual Background Check Affirmation

Board President

Board President Signature for Charter Annual Report Affirmation can be found in the Uploaded Board Affirmation Statement.

Chief Executive Officer

Dr. Michael Leitera

Charter Annual Administrative Certification Affirmation

Board President

Board President Signature for Charter Annual Report Affirmation can be found in the Uploaded Board Affirmation Statement.

Chief Executive Officer

Dr. Michael Leitera

Charter School Identification of Students with Specific Learning Disabilities using Response to Intervention Assurance/Affirmation

Board President

Board President Signature for Charter Annual Report Affirmation can be found in the Uploaded Board Affirmation Statement.

Chief Executive Officer

Dr. Michael Leitera



WHERE LEARNING HAS NO LIMITS

2100 Corporate Drive
Suite 500
Wexford, PA 15090

1-888-997-3352
F: 1-866-977-3527
www.padistance.org

February 4, 2015

Via Certified Mail

Pedro A. Rivera
Acting Secretary of Education
Pennsylvania Department of Education
Charter School Office
333 Market Street, 10th Floor
Harrisburg, PA 17126-0333

Re: Cyber Charter School Application Renewal

Acting Secretary Rivera:

Enclosed please find the executed charter with Board of Trustees signatures for PA Distance Learning Charter School.

Sincerely,

Patricia R. Rossetti
Chief Executive Officer

Enclosure

COMMONWEALTH OF PENNSYLVANIA
CHARTER
to operate a public school known as
PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

Pursuant to the authority vested in the Pennsylvania Department of Education under the Public School Code of 1949, as amended, and specifically under 24 P.S. § 17-1745-A, the Board of Trustees of **Pennsylvania Distance Learning Charter School** is hereby granted a Charter to operate a public cyber charter school for the period commencing on **July 1, 2015** and ending on **June 30, 2020**. The grant of this Charter was approved by the Pennsylvania Department of Education on **January 15, 2015**.

It is specifically understood and agreed between the signatories hereto that:

- 1) the Board of Trustees shall operate the cyber charter school in accordance with the provisions of 24 P.S. §§ 17-1741-A – 17-1751-A, any amendments thereto enacted during the term of this Charter and any regulations or standards applicable to cyber charter schools;
- 2) the granting of this Charter is specifically contingent upon operation of the cyber charter school in strict adherence to the terms of the Renewal Application, submitted by the Board of Trustees on or by October 1, 2011 and any previous application(s) approved by the Pennsylvania Department of Education as modified by the Renewal Application. Said Renewal Application and previous application(s) are incorporated by reference as if fully set forth;
- 3) this Charter constitutes a legally binding agreement for the term set forth above and the terms of said agreement cannot be changed absent a written amendment to this Charter;
- 4) this Charter may be renewed for additional periods of five year durations and upon any such renewal, a new charter shall be executed by the parties;
- 5) the Department reserves the right to continue to assess and review Pennsylvania Distance Learning Charter School's operation of the cyber charter school and notify Pennsylvania Distance Learning Charter School of any violation of this Charter or other applicable requirements and seek correction of the violation, and to take action against the Pennsylvania Distance Learning Charter School, if necessary, including revocation or nonrenewal of this Charter based on any information that was or could have been reviewed prior to this charter renewal or that may be discovered during future or ongoing assessments or reviews;
- 6) this Charter can only be terminated in accordance with the provisions of applicable law.

WHEREFORE, the undersigned, intending to be legally bound hereby set their hands this 30th day of **January, 2015**.

ATTEST:

Patricia R. Rossetti

Mary Alicandro

Mary Alicandro

Edward Mandell

ATTEST:

BOARD OF TRUSTEES

[Signature] JOHN MAROUS
BOARD PRESIDENT

[Signature] WILLIAM
DIBENEDETTO
TRUSTEE

[Signature] Secretary

[Signature] Treasurer

PENNSYLVANIA DEPARTMENT OF
EDUCATION

PENNSYLVANIA DEPARTMENT OF EDUCATION

Pennsylvania Distance Learning : **Charter Renewal Effective:**
Charter School : **July 1, 2015 – June 30, 2020**
Cyber Charter Renewal :

Decision to Renew Charter

Pursuant to the Charter School Law (CSL), 24 P.S. §§ 17-1701-A – 17-1751-A, the Pennsylvania Department of Education (Department) has the authority and responsibility to renew or not renew the charter of a cyber charter school. 24 P.S. § 17-1741-A(a)(3). The Department may decide not to renew a charter based on the criteria set forth in section 1729-A of the CSL, 24 P.S. § 17-1729-A. In addition, a cyber charter school must be in compliance with the material conditions, standards and procedures contained in the written charter, meet the requirements for student performance set forth in 22 Pa. Code Ch. 4, meet generally accepted standards of fiscal management and audit requirements, be in compliance with the CSL and all other applicable law, provide all material components of each student’s education, and maintain the financial ability to provide services.

Pennsylvania Distance Learning Charter School (PA Distance Learning) was granted a charter by the Department for the term of July 1, 2007 through June 30, 2012. PA Distance Learning submitted a renewal application to continue operating as a cyber charter school and has been permitted to continue to operate its cyber charter school by extension of the previous charter term until such time as the Department completed its review of the renewal application.

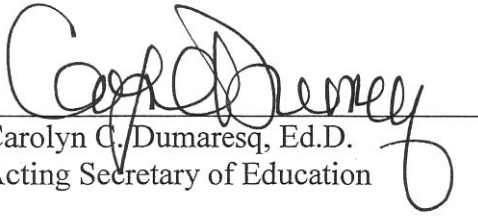
Based on a comprehensive review of PA Distance Learning’s operation of the cyber charter school during the charter term of July 1, 2007 through June 30, 2012, including the information submitted with the renewal application, the Department is renewing PA Distance Learning’s charter to operate a cyber charter school. PA Distance Learning may continue to operate its cyber charter school by extension of the existing charter term, until the commencement of the term of the renewed charter.

The renewed charter shall be effective for a term of five (5) years beginning July 1, 2015, and ending June 30, 2020.

The Department reserves the right to continue to assess and review PA Distance Learning’s operation of the cyber charter school and to take action to revoke PA Distance Learning’s charter based on any information that was or could have been reviewed prior to this charter renewal or discovered during future or ongoing assessments or review. The Department does not waive and expressly reserves the right to notify PA Distance Learning of any violation of its charter, the CSL, or other applicable requirements and seek correction of the violation and to take action against the PA Distance Learning, if necessary, including revocation or nonrenewal of the charter.

The Department is also providing written notice to PA Distance Learning of areas of the

operation of the cyber charter school that require particular attention and correction. Such notice may be provided with this charter renewal or at any time during the operation of the cyber charter school. The notice is provided to allow PA Distance Learning the opportunity to address areas of operation of the cyber charter school that may not be in compliance with applicable requirements. Failure to address areas identified by the Department by June 30, 2015, may result in additional action by the Department, including revocation of the charter.



Carolyn C. Dumaresq, Ed.D.
Acting Secretary of Education

4/15/15
Date Mailed

APPENDIX A

Pursuant to section 1742-A of the Charter School Law (CSL), 24 P.S. § 17-1742-A, the Pennsylvania Department of Education (Department) has conducted an assessment and review of the operation of the cyber charter school by Pennsylvania Distance Learning Charter School (PA Distance Learning). Based on this assessment and review, the Department has identified areas of the operation of the cyber charter school which PA Distance Learning should further examine and implement corrective action to remediate any noncompliance with applicable requirements.

PA Distance Learning must be prepared to provide information and documentary evidence to the Department during any future review by the Department of the cyber charter school's operations that demonstrates that the cyber charter school operates in compliance with all applicable requirements. The Department will review these areas no earlier than June 30, 2015.

Areas identified for examination by PA Distance Learning:

- English as a Second Language
- Professional Development/Teacher Induction
- Assessment and Accountability

PA Distance Learning should examine its English as a Second Language Program.

A cyber charter school must have an effective English as a Second Language (ESL) Program to facilitate a student's achievement of English proficiency and the academic standards under 22 Pa. Code § 4.12. Programs under this section shall include appropriate bilingual-bicultural or ESL instruction. A Department Basic Education Circular (BEC) entitled *Educating Students with Limited English Proficiency (LEP) and English Language Learners (ELL)*, 22 Pa. Code § 4.26, (ESL BEC) states that each local education agency (LEA) must have a written Language Instructional Program, and provides information relating to the required components for the Program.

PA Distance Learning demonstrated its awareness of the requirements in the Department's ESL BEC. PA Distance Learning's Limited English Proficient Student Program Policy addresses certain required components of an ESL program, including identification, placement, and exit. However, PA Distance Learning's criteria for exemption from a formal English language proficiency assessment for possible placement into a language instruction educational program and for program exit are inconsistent with Pennsylvania requirements. In addition, PA Distance Learning's procedure of monitoring students for one year after students exit an ESL program and the grading policy are inconsistent with Pennsylvania requirements.

In addition, PA Distance Learning did not: (1) identify its program model and explain the educational theory upon which it is based; (2) describe the manner in which teachers deliver daily instruction to support the program model or the types of adaptations to daily instruction based on proficiency level; (3) identify the number of courses required for elementary and secondary ESL students and the amount of on-line time required for ESL instruction; (4) provide a list of ESL courses with course descriptions; (5) demonstrate that its ESL planned instruction

and curriculum are aligned to PA English Language Proficiency Standards (PA ELPS) and PA Reading, Writing, Listening and Speaking Standards; (6) describe a procedure to administer the annual English Language Proficiency assessment (ACCESS for ELLS) or the Pennsylvania System of State Assessment (PSSA) and Keystone Exams with appropriate accommodations.

At a minimum, PA Distance Learning should be prepared to provide to the Department the following:

- A revised Limited English Proficient Student Program Policy that includes the criteria for identification, placement and exit as well as the processes for monitoring and grading consistent with Pennsylvania requirements.
- An identification of PA Distance Learning's program model and an explanation of the educational theory upon which it is based.
- A description of the manner in which teachers deliver daily instruction to support the program model and the types of adaptations to daily instruction based on proficiency level.
- An identification of the number of courses required for elementary and secondary ESL students and the amount of on-line time required for ESL instruction.
- A list of ESL courses with course descriptions.
- Demonstration that its ESL planned instruction and curriculum are aligned to PA ELPS and PA Reading, Writing, Listening and Speaking Standards.
- A description of PA Distance Learning's procedure to administer ACCESS for ELLs as well as PSSAs and Keystone Exams with appropriate accommodations.

PA Distance Learning should examine its Professional Development Plan and Teacher Induction Plan.

A cyber charter school must have a professional development plan for the faculty that explains the following: (1) the professional development provider and participants; (2) the assessment of student needs to develop the professional development program; (3) the professional development program; and, (4) the evaluation of the professional development program.

PA Distance Learning provided its most recent Professional Development Plan, which indicated that board members, administrators, teachers, and educational specialist made up the planning committee. However, a professional development plan for a cyber charter school should also designate parents, community representatives, and local business representatives as part of the school's professional education planning committee. In addition, a professional education action plan for a cyber charter school should identify school activities with a start date, finish date, and status. PA Distance Learning's most recent action plan indicated that the school had yet to start its professional development activities. PA Distance Learning should ensure that its action plan is kept up-to-date to reflect the school's professional development programs.

A cyber charter school must have a detailed Teacher Induction Plan that explains the following: (1) the teacher induction council; (2) the assessment of inductees' needs; (3) the teacher induction program; (4) the oversight and evaluation of the teacher induction program; and, (5) recordkeeping.

PA Distance Learning provided its most recent Teacher Induction Plan. However, PA Distance Learning did not provide any information to demonstrate that it has implemented this plan.

At a minimum, PA Distance Learning should be prepared to provide to the Department the following:

- Documents evidencing that its professional education planning committee includes at least two parents, two community representatives, and two business representatives, in accordance with the Department's Professional Education guidelines.
- Documents evidencing that the status of all professional education activities is completed or ongoing and on schedule with an established finish date.
- Documents evidencing that it has implemented its Teacher Induction Plan.

PA Distance Learning should examine its assessment and accountability program.

A cyber charter school must meet the requirements for student performance set forth in 22 Pa. Code Ch. 4. Pennsylvania's state student assessment requirements are set forth in Ch. 4. *See* 22 Pa. Code §§ 4.51-4.52. Additionally, Ch. 4 provides for the Secretary to establish school profiles. *See* 22 Pa. Code § 4.61.

From 2007-2012, PA Distance Learning's academic performance and graduations rates have predominately been below acceptable academic standards for reaching Adequate Yearly Progress (AYP) and having a graduation rate of 85% or better, as set under the No Child Left Behind Act. PA Distance Learning did not reach AYP in any school year between the 2007-2008 and 2011-2012 school years.

In 2007-2008, 34% of students in the "all students" category scored proficient or better on the mathematics state assessment. In 2008-2009, the percentage decreased to 33%. In 2009-2010, the percentage increased to 39%. In 2010-2011, the percentage decreased to 36% and dropped again to 31% in 2011-2012.

In 2007-2008, 53% of students in the "all students" category scored proficient or better on the reading state assessment. The percentage decreased to 47% in 2008-2009. The percentage increased to 49% in 2009-2010. In 2010-2011, the percentage increased again to 55%. The percent decreased to 37% in 2011-2012.

In 2007-2008, 2008-2009, 2009-2010, 2010-2011, and 2011-2012, PA Distance Learning had a graduation rate of 60.2%, 51.4%, 15%, 51.4%, and 53.3% respectively.

In October 2013, the Department released the Pennsylvania School Performance Profile (SPP). SPP provides a quantitative building level academic performance score based on several academic indicators, including, but not limited to, academic achievement, closing the achievement gap and academic growth. The benchmark for academic success is closing one-half of the achievement gap over a six-year period. The six-year target was defined in 2012-2013, which is the baseline year. As each year progresses, the annual cumulative closure will be calculated. A school that is meeting the overall closure will be defined as meeting its annual target.

The Department will use SPP to review each cyber charter school's performance on state assessments, standardized tests and other performance indicators. Although closing the achievement gap is the benchmark, the Department will review all academic indicators to assess whether each cyber charter school is making progress over time in bringing students up to grade level.

Beginning with the issuance of 2015-2016 SPP data, the Department may require corrective action during the charter term when a cyber charter school fails to meet the academic performance benchmarks as described above. The Department may also use a cyber charter school's persistent failure to meet these academic performance benchmarks as a basis for revocation or nonrenewal of the cyber charter school's charter.

Therefore, notwithstanding that the Department has renewed PA Distance Learning's charter, the Department may, beginning with the 2015-2016 SPP data, require corrective action and/or use persistent failure to meet the academic benchmarks as a basis for nonrenewal or revocation of PA Distance Learning's charter.

At a minimum, PA Distance Learning should be prepared to provide to the Department the following:

- A written plan of action for increasing its academic performance and graduation rates.

**Board of Trustees Meeting for
 Pennsylvania Distance Learning Charter School**
 2605 Nicholson Road, Suite 4100, Sewickley, PA 15143
 Telephone: (888) 997-3352 Facsimile: (866) 977-3527
 Website: www.padistance.org

Board Meeting

Date: March 13, 2023
Time: 4:00 pm
Location: PA Distance Learning Charter School and via
 Teleconference at 888.988.2893, access 73527

MINUTES

MEETING TYPE: Regular Special Proposed Approved

A. Call to Order: The meeting was called to order at 4:00 p.m.

B. Roll Call

Board Member Attendance:

John Marous, President	xPresent	<input type="checkbox"/> Absent
William Donahue, Vice President	xPresent	<input type="checkbox"/> Absent

Other Attendees:

Michael Leitera, PDLCS	xPresent	<input type="checkbox"/> Absent
Patricia Rossetti, PDLCS	xPresent	<input type="checkbox"/> Absent
Aubrey Ploesch, Elementary Principal, PDLCS	xPresent	<input type="checkbox"/> Absent
Kelly Crooks, Chief Academic Officer, PDLCS	xPresent	<input type="checkbox"/> Absent
Kimberly Crandall, MS Principal, PDLCS	xPresent	<input type="checkbox"/> Absent
Michael Whisman, Charter Choices	xPresent - phone	<input type="checkbox"/> Absent
Nicholas Kocuba, Chief Operating Officer, PDLCS	x Present	<input type="checkbox"/> Absent
Charles Mort, HS Principal, PDLCS	x Present	<input type="checkbox"/> Absent
Dean Pappaterra, Chief Compliance Officer, PDLCS	xPresent	<input type="checkbox"/> Absent
Stephanie Faith, Special Education Co., PDLCS	xPresent	<input type="checkbox"/> Absent
Leigh Anne Lord, Recording Secretary, PDLCS	xPresent	<input type="checkbox"/> Absent
Sheryl Allmon, Procurement Coordinator, PDLCS	xPresent	<input type="checkbox"/> Absent
Sarah Simmons, Teacher, PDLCS	xPresent -phone	<input type="checkbox"/> Absent
Tracey Colbert, Teacher, PDLCS	xPresent -phone	<input type="checkbox"/> Absent
Kara Buncic, School Counselor, PDLCS	xPresent -phone	<input type="checkbox"/> Absent
Taydum Johnson, Student, PDLCS	xPresent -phone	<input type="checkbox"/> Absent

C. Pledge of Allegiance

D. Public Comment Mr. Kocuba expressed gratitude for the dedication and work that Mrs. Rossetti has dedicated to the school and wished her the best of luck in her retirement.

E. Review of Agenda

**Board of Trustees Meeting for
Pennsylvania Distance Learning Charter School**
2605 Nicholson Road, Suite 4100, Sewickley, PA 15143
Telephone: (888) 997-3352 Facsimile: (866) 977-3527
Website: www.padistance.org

F. Standard Business

i. Meeting Minutes of December 5, 2022 Board Meeting

Mr. Marous asked for a motion to approve the minutes of the December 5, 2022 Board Meeting.
Mr. Donahue made the motion – so moved.

Ayes: 2

Opposed: 0

G. New Business

i. Student Report

Taydum Johnson presented the student report. The student expressed sincere gratitude for the amazing and supportive staff of the School. She highlighted the created freedom the teachers have given students with regards to assignments. She also emphasized that the field trips and clubs help to establish a community within the school. She spotlighted the School's Book Buddies Club where the High School is partnering with the Elementary School to conduct in class read aloud opportunities. She also felt that the club will be able to provide mentorship opportunities. Mr. Marous asked her what has been her favorite class and she indicated that as she wants a nursing career, any science class has always ranked high with her. He also asked her how she decided to attend PDLCS. She explained that health issues prompted the search. The initial intention was to attend the school for the 9th grade only, but it has been very easy to build relationships and her classes have been so strong that she plans to graduate from the school.

ii. Board Motion to accept the resignation for retirement of Patricia Rossetti as Chief Executive Officer.

Mr. Marous thanked Mrs. Rossetti for her years of dedicated service to the school. Dr. Leitera expressed appreciation for her assistance during the CEO transition.

Mr. Marous asked for a motion to approve the resignation of Mrs. Patricia Rossetti. Mr. Donahue made the motion – so moved.

Ayes: 2

Opposed: 0

iii. Board Motion to appoint Michael Leitera as Chief Executive Officer and he will replace Mrs. Rossetti as signatory, the eSignature Resolution and other school-related accounts.

Mr. Marous asked for a motion to appoint Michael Leitera as Chief Executive Officer, as signatory for school related accounts and approval of the eSignature Resolution. Mr. Donahue made the motion – so moved.

Ayes: 2

Opposed: 0

iv. State of the School Report

Dr. Leitera presented the State of the School Report. He highlighted that the School's highest enrollments continue to be in Grades 7-10 and the Special Education enrollment continues to be approximately twenty-five percent of total enrollment. He provided a status of the transition to the

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new SIS and Technical Services – indicating that the transition was on target and going well. He also provided an update on the School’s CSI Designation. Ms. Crooks explained that the school had completed a facilitated internal assessment. Based on these results, the CSI Facilitators will provide suggestions. While the goals will remain the same, action steps may change based on the survey results. Dr. Leitera spotlighted the School’s recent Ed Camp (professional development session). Mr. Marous inquired about the School’s implementation of CDT testing to replace Scantron. Mrs. Ploesch explained that the CDT is closely aligned to the state assessments. As a result, it is anticipated that students will be more comfortable with the state assessments and experience less anxiety. Mr. Donahue inquired about exit interviews for departing employees and if there was a trend in the reason for departing. Mrs. Lord explained that exit interviews had been conducted and there was no one reason for the departures.

Mr. Marous asked for a motion to approve the State of the School Report. Mr. Donahue made the motion – so moved.

Ayes: 2

Opposed: 0

v. Financial Report

Mr. Whisman explained that total current assets decreased and this decrease was due to a decrease in cash as there is currently a higher district receivables amount. However, he also indicated that this is typical at this point in the budget year and the trend is continuing. The differences between Budgeted vs Actual is due to the enrollment variance. However, in reviewing February data, enrollment tends to be trending up. Mr. Marous asked if the Committed Fund Balance could be broken out by fund on the Balance Sheet and Mr. Whisman indicated that this could be reflected.

Mr. Marous asked for a motion to approve the Financial Report. Mr. Donahue made the motion – so moved.

Ayes: 2

Opposed: 0

vi. Public Relations Proposal

Due to underwhelming results of the 2022-2023 enrollment season, Mr. Kocuba indicated that the School had received proposals from its current vendor and two other providers. Currently, the biggest concern is the need for increased optimization of search engines as we enter the 2023-2024 enrollment season. To that extent, the School has identified one vendor that could provide this assistance. It would require an investment of approximately \$27,600 for the remainder of this budget year. The recommendation to the Board would be to approve this amount and relook a possible longer term contract during the May Board Meeting. Mr. Marous indicated that he felt it was a good use of funds and it was important to fix the optimization now in order to get the message out going forward and fit with the need for continued increases in enrollment per our budgetary figures.

Mr. Marous asked for a motion to approve the funding before the end of the current budgetary year and to revisit a possible contract extension during the Board’s Annual Meeting in May. Mr. Donahue made the motion – so moved.

Ayes: 2

Opposed: 0

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vii. Updated Board Procurement Policy

Mr. Pappaterra presented minor changes to the Procurement Policy that would put the policy in line with current regulatory industry thresholds.

Mr. Marous asked for a motion to confirm continuation of the current policy with the updates. Mr. Donahue made the motion – so moved.

Ayes: 2

Opposed: 0

H. Reminder of Next Board Meeting

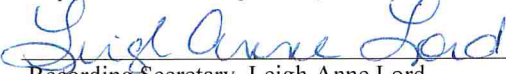
To be held at the Pennsylvania Distance Learning Charter School and by teleconference on May 1, 2023.

I. Executive Session (if necessary)

The meeting adjourned at 5:18 p.m. and moved into Executive Session.

MINUTES CERTIFICATION


Proposed minutes respectfully submitted,



Recording Secretary, Leigh Anne Lord

5/9/2023

Date



Board Secretary, William Donahue

5/9/2023

Date

**Board of Trustees Meeting for
Pennsylvania Distance Learning Charter School**
2605 Nicholson Road, Suite 4100, Sewickley, PA 15143
Telephone: (888) 997-3352 Facsimile: (866) 977-3527
Website: www.padistance.org

Board Meeting

Date: September 20, 2022
Time: 4:00 pm
Location: PA Distance Learning Charter School and via
Teleconference at 888.988.2893, access 73527

MINUTES

MEETING TYPE: Regular Special Proposed Approved

A. Call to Order The meeting was called to order at 4:00 p.m.

B. Roll Call

Board Member Attendance:

John Marous, President	xPresent	<input type="checkbox"/> Absent
William Donahue, Vice President	xPresent -phone	<input type="checkbox"/> Absent

Other Attendees:

Patricia Rossetti, Chief Executive Officer, PDLCS	xPresent	<input type="checkbox"/> Absent
Aubrey Ploesch, Elementary Principal, PDLCS	<input type="checkbox"/> Present	x Absent
Kelly Crooks, Chief Academic Officer, PDLCS	xPresent -phone	<input type="checkbox"/> Absent
Kimberly Crandall, MS Principal, PDLCS	xPresent	<input type="checkbox"/> Absent
Michael Whisman, Charter Choices	xPresent	<input type="checkbox"/> Absent
Nicholas Kocuba, Chief Operating Officer, PDLCS	x Present	<input type="checkbox"/> Absent
Charles Mort, HS Principal, PDLCS	x Present	<input type="checkbox"/> Absent
Dean Pappaterra, Chief Compliance Officer, PDLCS	xPresent	<input type="checkbox"/> Absent
Stephanie Faith, Special Education Co., PDLCS	xPresent	<input type="checkbox"/> Absent
Leigh Anne Lord, Recording Secretary, PDLCS	xPresent	<input type="checkbox"/> Absent
Sheryl Allmon, Procurement Coordinator, PDLCS	xPresent	<input type="checkbox"/> Absent
Mary Ann Calderone, PIMS Coordinator, PDLCS	xPresent	<input type="checkbox"/> Absent
Kara Buncic, School Counselor, PDLCS	xPresent -phone	<input type="checkbox"/> Absent
Hannah Noah, Student, PDLCS	xPresent -phone	<input type="checkbox"/> Absent
Alexandria Gibson, Student, PDLCS	xPresent -phone	<input type="checkbox"/> Absent

C. Pledge of Allegiance

D. Public Comment none

E. Review of Agenda

F. Standard Business

i. Meeting Minutes of May 10, 2022 Board Meeting

Mr. Marous asked for a motion to approve the minutes of the June 15, 2022 Board Meeting.
Mr. Donahue made the motion – so moved.

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Ayes: 2

Opposed: 0

G. New Business

i. Student Report

Hannah Noah and Alexandria Gibson, current 11th graders, delivered the first student report of the academic school year 2022-2023. In their short synopsis, they indicated the positive aspects they have witnessed thus far in this school year, and items that they were looking forward to this academic year. They stressed that their classes were very interactive and engaging. Specifically in Spanish, the teacher was providing different choices based on the student's learning style. The transition to Zoom has been very positive. The move from the benchmark test, Scantron, to CDT also garnished positive reviews. Of special importance to the students, both indicated that they felt their voices were being heard in classes which was a bit different than in previous years. They were looking forward the after school clubs starting in the near future as this year there appeared to be more new clubs and the scheduling would allow for multiple club attendance. They both indicated that the array of choices with Electives helped keep school exciting and enabled students to discover what might interest them in the future. The Community Engagement Team's Community Hours also was extremely positive as it gave students an ability to interact with students in their own area. Mr. Marous asked if the participation level in classes was higher this year. The students indicated that they felt it was much better than in previous years and that it was not always verbal but in chat format. He also asked if there was one thing that could make the school better. The students felt that more teachers should inquire about students' learning style. Mr. Donahue asked about their length of time with the school. Both students were in their third year with PDLCS; entering when they were in the 9th grade.

ii. Financial Report

Mrs. Rossetti indicated that the audit process was going very well and the line of credit with PNC was currently under the renewal process. Mr. Wiseman echoed the positive audit process and presented the June 30, 2022 financials. He indicated that cash had increased year over year and receivables were down which reflected more districts paying the school directly. Mr. Marous inquired about the ADM for 21-22. Mr. Whisman replied that the ADM was 1,364 students but we had budgeted for 1,240 students. He continued with the financials indicating that monthly ratios continue to be very positive. Mr. Donahue inquired as to why more new hires were opting into PSERS. Mrs. Rossetti explained the process. If the new hire had been an active member of PSERS with a break of no more than 60 days (due to summer break), they could remain in PSERS. If not, they would be placed in the school's 403(b) plan. We have been hiring more experienced teachers who come to the school as active members of PSERS.

Mr. Marous asked for a motion to approve the June 30, 2022 financial statements. Mr. Donahue made the motion – so moved.

Ayes: 2

Opposed: 0

iii. State of School Report

Mrs. Rossetti presented the State of the School Report indicating that as of September 14, 2022, there were 1,279 students enrolled. There have been no significant changes to gender and ethnicity percentages. Currently, there is a 23% Special Education enrollment rate. There has been a slight decrease in enrollment at the elementary level, specifically fourth, sixth and eighth grades and a slight

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increase in high school enrollment. As of September 20, there were 272 new students, 1015 returning students and 24 pending withdrawals. She announced the staff departures and new staff hires since the last board meeting, emphasizing that some new hires were due to the creation of the Instructional Specialist roles. She indicated that the 2022-2023 school year start was one of the smoothest starts ever. Shipping was ahead of schedule despite have difficulties finding temporary assistance. The IT department was averaged less than 100 help desk calls on the first day of school – a significant decrease. The school has move from the benchmark test, Scantron, to CDT, which is aligned to PSSA and Keystone standards and will provide teachers with a better understanding of current student levels. Ms. Crandall, MS Principal, provided some initial data on testing participation after finishing the first day of testing: 89% of sixth graders, 77% of seventh graders and 80% of eighth graders had taken the Math benchmark test. The following two days would center on Reading (Day 2) and Grammar and Science (Day 3). Mr. Mort (HS Principal) explained that the test self adapts to the student level which is very helpful and results are in real time. Mrs. Rossetti continued her presentation with an update of other departments within the school. The school has a new R&D Coordinator; who is currently working on several program changes within procurement and human resources and detailed other research and implementation projects. Mr. Kocuba, COO, is leading the new SIS implementation. The Curriculum and Instruction Coordinator will be implementing new Science, Social Studies and Elective core materials. Within the Strategic Plan, the Community Engagement portion is expected to be completed by the end of the calendar year. Mrs. Rossetti provided updates on the other 2022-23 Strategic Plan goals.

Mrs. Rossetti finished her presentation with an analyzation of 8th grade data for the 2021-2022 school year. The data story centered on impact of enrollment dates of students on test results, variances over the three content areas and how overall standardized test scores and participation compared to scores and participation in benchmark assessments. Mr. Marous commended the team for delving into the data and inquired if there was a difference in attendance versus engagement. Mrs. Rossetti indicated that there was a 92% attendance rate versus a 65% passing rate. She also indicated that more data would be presented by the academic team during the December board meeting. Mr. Donahue expressed his opinion that this data inquiry was an impressive strategy and he was encouraged by the engagement of the academic team.

Mr. Marous made the motion to approve the State of the school. Mr. Donahue seconded – so moved.

Ayes: 2

Opposed: 0

iv. Resolution Student No. 241-22

Mr. Marous asked for a motion to approve the Student Resolution. Mr. Donahue made the motion – so moved.

Ayes: 2

Opposed: 0

v. Board Policy – Transgender and Gender Non-Conforming Youth Policy

Mrs. Rossetti indicated that the policy stems from a new Philadelphia based policy. Since our students are located throughout the state, it was recommended by legal counsel that we adopt a similar policy. Mr. Marous stated that it was important to recognize this policy and asked if we had the capability to know how a student wanted to be identified. Mrs. Rossetti presented the current procedure. Mr. Donahue inquired as to what would happen if another locality adopted a different policy – how the

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school would handle it. Mrs. Rossetti answered that we would most likely continue with our current policy and procedure with the continued recommendation of legal counsel.

Mr. Marous asked for a motion to approve Board Policy. Mr. Donahue made the motion – so moved.

Ayes: 2

Opposed: 0

vi. Human Resources Update

Mr. Marous announced the retirement of Mrs. Rossetti. Mr. Marous praised the service that Mrs. Rossetti has been to the school since her arrival in 2005 and throughout her tenure as CEO which began in 2013. He explained that the search for a new CEO will begin shortly. He commended Mrs. Rossetti for all of her efforts and wished the best for the next stage of her life in Florida.

H. Reminder of Next Board Meeting


To be held at the Pennsylvania Distance Learning Charter School and by teleconference on December 5, 2022.

I. Executive Session (if necessary)

The meeting adjourned at 5:30 p.m. and moved into Executive Session.

MINUTES CERTIFICATION

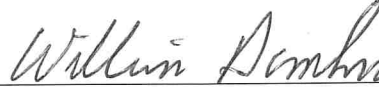
Proposed minutes respectfully submitted.




Recording Secretary, Leigh Anne Lord



Date



Board Secretary, William Donahue



Date

**Board of Trustees Meeting for
 Pennsylvania Distance Learning Charter School**
 2605 Nicholson Road, Suite 4100, Sewickley, PA 15143
 Telephone: (888) 997-3352 Facsimile: (866) 977-3527
 Website: www.padistance.org

Board Meeting

Date: December 5, 2022
Time: 4:00 pm
Location: PA Distance Learning Charter School and via
 Teleconference at 888.988.2893, access 73527

MINUTES

MEETING TYPE: Regular Special Proposed Approved

A. Call to Order The meeting was called to order at 4:08 p.m.

B. Roll Call

Board Member Attendance:

John Marous, President	xPresent	<input type="checkbox"/> Absent
William Donahue, Vice President	xPresent	<input type="checkbox"/> Absent

Other Attendees:

Patricia Rossetti, Chief Executive Officer, PDLCS	xPresent	<input type="checkbox"/> Absent
Aubrey Ploesch, Elementary Principal, PDLCS	xPresent	<input type="checkbox"/> Absent
Kelly Crooks, Chief Academic Officer, PDLCS	xPresent	<input type="checkbox"/> Absent
Kimberly Crandall, MS Principal, PDLCS	xPresent	<input type="checkbox"/> Absent
Michael Whisman, Charter Choices	xPresent	<input type="checkbox"/> Absent
Nicholas Kocuba, Chief Operating Officer, PDLCS	x Present	<input type="checkbox"/> Absent
Charles Mort, HS Principal, PDLCS	x Present	<input type="checkbox"/> Absent
Dean Pappaterra, Chief Compliance Officer, PDLCS	xPresent	<input type="checkbox"/> Absent
Stephanie Faith, Special Education Co., PDLCS	xPresent	<input type="checkbox"/> Absent
Leigh Anne Lord, Recording Secretary, PDLCS	xPresent	<input type="checkbox"/> Absent
Sheryl Allmon, Procurement Coordinator, PDLCS	xPresent	<input type="checkbox"/> Absent
Maggie Kelly Brown, Teacher, PDLCS	xPresent -phone	<input type="checkbox"/> Absent
Kara Buncic, School Counselor, PDLCS	xPresent -phone	<input type="checkbox"/> Absent
Casey Allshouse, Student, PDLCS	xPresent -phone	<input type="checkbox"/> Absent
Grace Allshouse, Student, PDLCS	xPresent -phone	<input type="checkbox"/> Absent
Sean Kocan, Auditor, HBK	xPresent	<input type="checkbox"/> Absent
Tim Gagen, Auditor, HBK	xPresent	<input type="checkbox"/> Absent

C. Pledge of Allegiance

D. Public Comment none

E. Review of Agenda

**Board of Trustees Meeting for
Pennsylvania Distance Learning Charter School**
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F. Standard Business

i. Meeting Minutes of September 20, 2022 Board Meeting

Mr. Marous asked for a motion to approve the minutes of the September 20, 2022 Board Meeting.

Mr. Donahue made the motion – so moved.

Ayes: 2

Opposed: 0

G. New Business

i. Student Report

Siblings, Casey (12th Grade) and Grace (10th Grade) Allshouse presented the student report. Both have been students of the school for several years. Their brief highlighted several positive aspects of the school year thus far. Grace pointed out that assistance from the teaching staff was readily available and Casey provided an example of his experience requested recommendations for his college application. Both were highly impressed with the after school clubs and tutoring efforts and gave specific examples of the school's ESports and Dungeons and Dragons Clubs. Casey explained the recent Core 4 Jeopardy Event at the high school and Grace discussed a recent speaker from NASA and also highlighted the Career Fair experience at the elementary school.

ii. Audit Report

Sean Kocan and Tim Gagen, auditors with HBK, presented the audit findings through June 30, 2022. Both expressed appreciation of the relationship between their firm, the school and Charter Choices. They explained that the new GASB requirements had been implemented and while the report was still in draft form, they did not anticipate any findings. The report was under standard review and should be released shortly.

Mr. Marous asked for a motion to conditionally approve the June 30, 2022 financial statements. Mr. Donahue made the motion – so moved.

Ayes: 2

Opposed: 0

iii. Financial Report

Mr. Whisman presented the October 31, 2022 financial reports and indicated the metrics remain healthy and strong. While receivables were higher than in June, when compared with receivables in October 2021, they were actually less. He emphasized that the ADM was driving the decrease in revenues. Originally, the ADM was forecasted at 1,400 students, it has now been revised to 1,250 students which is more in line with the current enrollment of 1,220.

Mr. Marous asked for a motion to approve the financial report as presented. Mr. Donahue made the motion – so moved.

Ayes: 2

Opposed: 0

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iv. State of the School Report

Mrs. Rossetti presented the current State of the School report. At the time of the report preparation, there was an enrollment of 1,264 students with the demographics remaining the same as previous months. Currently, the highest enrollments were in grades 6-9. She highlighted that there were 24 after school clubs with approximately 200 students participating, in addition to 61 students receiving after school tutoring provided by the staff. She presented an in-depth data analysis of the school's statistical data consisting of a comparison of our Future Ready Index, PVAAS, and Pennsylvania State Assessments as compared to other cyber charter schools and the State. Mr. Marous indicated that it was helpful to see where we stood against other cyber schools.

Mr. Marous asked for a motion to approve the State of the School Report. Mr. Donahue made the motion – so moved.

Ayes: 2

Opposed: 0

v. Proposed 2023-2024 Academic Calendar

Mrs. Rossetti presented the proposed 2023-2024 Academic Calendar indicating that the only significant change was to build in more professional development days for staff and to scatter them throughout the school year.

Mr. Marous asked for a motion to approve the 2023-2024 Academic Calendar. Mr. Donahue made the motion – so moved.

Ayes: 2

Opposed: 0

vi. Technical Support Recommendation

Mr. Kocuba explained that the school's current contract for technical support with Cloudcast was up for renewal. As part of this process, in working with the school's Research and Development Coordinator, they had initiated the RFI process with three vendors and Cloudcast. While Cloudcast did not submit a RFI, the three other firms did and were evaluated using a standard rubric. As a result, the School was recommending that the service contract be awarded to Infradapt, a service provider who works with a number of other charter schools. It was the opinion of the committee that Infradapt had the highest level of network and cyber security, had provided a detailed implementation guide and a list of technicians who would be resourced to the school. Mr. Donahue asked for confirmation that Infradapt's cost proposal was in fact, considerably less than our current vendor, Cloudcast. Mr. Kocuba indicated that it was and that it did not appear to contain any "hidden" costs as some of the other vendors. Mr. Marous stated that it would be helpful to understand more of the company structure of Infradapt. Mr. Kocuba answered that this information would be provided.

Mr. Marous asked for a motion to pursue a change in technical services from Cloudcast to Infradapt. Mr. Donahue made the motion – so moved.

Ayes: 2

Opposed: 0

**Board of Trustees Meeting for
Pennsylvania Distance Learning Charter School**
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vii. 2022-2023 and 2023-2024 Parent Student Handbook

Mr. Pappaterra presented the minor changes made to the 2022-2023 Parent Student Handbook. The edits to the current year's handbook incorporated changes made due to Act 55.

Mr. Marous asked for a motion to approve the changes made to the 2022-2023 Parent Student Handbook. Mr. Donahue made the motion – so moved.

Ayes: 2

Opposed: 0

Mr. Pappaterra then presented the 2023-2024 Parent Student Handbook indicating the same changes but with the inclusion of the now approved 2023-2024 Academic Calendar.

Mr. Marous asked for a motion to approve the changes made to the 2023-2024 Parent Student Handbook. Mr. Donahue made the motion – so moved.

Ayes: 2

Opposed: 0

viii. 2023-2024 Employee Handbook

Mr. Pappaterra presented the minor changes made to the Employee Handbook. Given the minor changes, there was no resulting discussion.

Mr. Marous asked for a motion to approve the 2023-2024 Employee Handbook. Mr. Donahue made the motion – so moved.

Ayes: 2

Opposed: 0

H. Reminder of Next Board Meeting

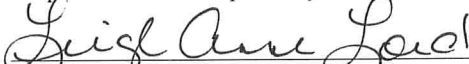
To be held at the Pennsylvania Distance Learning Charter School and by teleconference on March 6, 2023.

I. Executive Session (if necessary)

The meeting adjourned at 5:40 p.m. and moved into Executive Session.

MINUTES CERTIFICATION


Proposed minutes respectfully submitted.



Recording Secretary, Leigh Anne Lord

03/13/2023

Date



Board Secretary, William Donahue

3-13-2023

Date

**Board of Trustees Meeting for
Pennsylvania Distance Learning Charter School**
2605 Nicholson Road, Suite 4100, Sewickley, PA 15143
Telephone: (888) 997-3352 Facsimile: (866) 977-3527
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Board Meeting

Date: May 9, 2023
Time: 4:00 pm
Location: PA Distance Learning Charter School and via
Teleconference at 888.988.2893, access 73527

MINUTES

MEETING TYPE: Regular Special Proposed Approved

A. Call to Order: The meeting was called to order at 2:00 p.m.

B. Roll Call

Board Member Attendance:

John Marous, President	xPresent	<input type="checkbox"/> Absent
William Donahue, Vice President	xPresent	<input type="checkbox"/> Absent

Other Attendees:

Michael Leiterra, CEO, PDLCS	xPresent	<input type="checkbox"/> Absent
Aubrey Ploesch, Elementary Principal, PDLCS	xPresent	<input type="checkbox"/> Absent
Kelly Crooks, Chief Academic Officer, PDLCS	xPresent -phone	<input type="checkbox"/> Absent
Kimberly Crandall, MS Principal, PDLCS	xPresent	<input type="checkbox"/> Absent
Michael Whisman, Charter Choices	xPresent	<input type="checkbox"/> Absent
Nicholas Kocuba, Chief Operating Officer, PDLCS	x Present	<input type="checkbox"/> Absent
Charles Mort, HS Principal, PDLCS	x Present	<input type="checkbox"/> Absent
Dean Pappaterra, Chief Compliance Officer, PDLCS	xPresent	<input type="checkbox"/> Absent
Stephanie Faith, Special Education Co., PDLCS	xPresent	<input type="checkbox"/> Absent
Leigh Anne Lord, Recording Secretary, PDLCS	xPresent	<input type="checkbox"/> Absent
Sheryl Allmon, Procurement Coordinator, PDLCS	xPresent	<input type="checkbox"/> Absent
Carol Smialek, Teacher, PDLCS	xPresent	<input type="checkbox"/> Absent
Tracey Colbert, Teacher, PDLCS	xPresent -phone	<input type="checkbox"/> Absent
Everett Peterson, Student, PDLCS	xPresent -phone	<input type="checkbox"/> Absent
Andrea Brauer, Charter Choices	xPresent -phone	<input type="checkbox"/> Absent

C. Pledge of Allegiance

D. Public Comment: none

E. Review of Agenda

F. Standard Business

i. Student Update: Everett Peterson

Everett Peterson, a sophomore who has attended our school for the past 10 years, gave an overview of the recent Game Night sponsored by several of the school's After School Clubs. He emphasized the interaction that the students, families and staff had throughout the event. Dr. Leiterra pointed out that there were several families who drove across the state to attend the event.

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ii. Meeting Minutes of December 5, 2022 Board Meeting

Mr. Marous asked for a motion to approve the minutes of the March 13, 2023 Board Meeting. Mr. Donahue made the motion; Mr. Marous seconded – so moved.

Ayes: 2

Opposed: 0

iii. State of the School Report

Dr. Leitera presented the State of the School report indicating that as of May 9, 2023, the school's enrollment totaled 1,341 students with a 24.4% Special Education enrollment rate. He also reiterated the success of the on-site and virtual Game Night recently presented by the school's After School Clubs. He highlighted another one of the school's clubs, Aspiring Authors, who recently published a book which contains short stories and poems written by the club's members. Mr. Kocuba presented the initial findings from the pre-audit report prepared by SEOBrand. He highlighted the keywords that were successful in search engines and our ranking compared to other cyber charter schools. The audit revealed approximately 1,200 issues related to search engine optimization and stressed that SEOBrand had already started to make changes. The school's website has been migrated to GoDaddy. It is anticipated that these changes will begin to show results in four to six months. Approved changes are being implemented within a number of days and the school will have monthly meetings with the vendor. Mr. Marous suggested that we look at the SEO traffic from July-August, 2022 and compare it to the traffic in July-August, 2023. Mr. Donahue inquired as to whether this vendor worked with other cyber schools. Mr. Kocuba answered in the negative. Mr. Marous asked if there had been any discussion about the school's messaging as we enter the enrollment season. He recommended a brainstorming session to occur prior to July to discuss the school's external and internal messaging. Mr. Pappaterra pointed out that at this point in time last year, the school had 22 new enrollment applications and currently, the school has 62 pending enrollments for the 2023-2024 school year.

Mr. Marous asked for a motion to approve the State of the School Report. Mr. Donahue made the motion; Mr. Marous seconded – so moved.

Ayes: 2

Opposed: 0

iv. Financial Report

Mr. Whisman presented the March 31, 2023 financial report indicating that enrollment challenges continue to exist and this is expected to continue as we enter the 2023-2024 school year. However, the key indicators are strong and reflects healthy financial picture. Mr. Marous praised the conservative approach to the budget development and stressed that this strategy should continue going forward.

Mr. Marous asked for a motion to approve the March 31, 2023 financial report. Mr. Donahue made the motion – so moved.

Ayes: 2

Opposed: 0

G. New Business

i. SY 2023-2024 Board Appointments

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Mr. Marous indicated that both he and Mr. Donahue have agreed to continue in their current roles on the Board of Trustees. He also announced that Stephen Cantanzarite has agreed to join the Board as a Trustee and one other individual has agreed to join the Board in September 2023.

Mr. Marous asked for motion to approve the 2023-2024 Board Appointments. Mr. Donahue made the motion; Mr. Marous seconded - so moved.

Ayes: 2

Opposed: 0

Mr. Marous asked for motion to add Stephen Cantanzarite as a Trustee. Mr. Donahue made the motion; Mr. Marous seconded - so moved.

Ayes: 2

Opposed: 0

ii. SY 2023-2024 Board Meeting Dates

Mr. Marous indicated that the June 13, 2023 Board Meeting date would need to change to June 26, 2023 due to scheduling conflicts.

Mr. Marous asked for a motion to tentatively approve the SY 2023-2024 Board Meeting Dates. Mr. Donahue made the motion; Mr. Marous seconded – so moved.

Ayes: 2

Opposed: 0

iii. 2023-2024 Draft Budget

Mr. Whisman presented the 2023-2024 Draft Budget indicating that the conservative strategy will continue. He stressed that ESSER funding would be discontinued after the 2023-2024 school year and an assumption that there would be rate decreases over the next five years. He also pointed out that fund balances would start to decrease after 2024-2025. Mr. Marous pointed out that it had been discussed for the 2022-2023 school year to provide a \$1,000 incentive payment for progress in each CSI parameter; however, the focus went towards the commitment bonus. As the school has shown tremendous progress in the Attendance parameter, it was recommended that this incentive be made within the confines of the 2022-2023 budget for those staff members employed by the school as of June 30, 2022. In further years, the incentive focus would be for achievement out of CSI and further discussions would take place during the June Board Meeting. He stressed that this draft budget reflects a continued conservative approach.

Mr. Marous asked for a motion to approve and post the Draft 2023-2024 Budget for comment. Mr. Donahue made the motion; Mr. Marous seconded – so moved.

Ayes: 2

Opposed: 0

Mr. Marous made a motion to approve a \$1,000 incentive payment to staff members employed by the school on June 30, 2022 and still employed on June 30, 2023 for positive progress on the Attendance criteria of the CSI plan. Mr. Donahue seconded the motion – so moved.

Ayes: 2

Opposed: 0

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iv. Comprehensive School Improvement Plan 2023-2024

Ms. Crooks presented the draft Comprehensive School Improvement Plan for 2023-2024. She stressed that these goals were set when the school entered CSI and the school was entering the final year of this initial categorization. She stressed that the school was in CSI for six reasons: Graduation Rates, Attendance, Career Readiness, and Academic Progress in Math, ELA and Science. We are currently over the state average for Attendance and have shown strong progress with Career Readiness and Graduation Rates. Mr. Marous pointed out that the action steps for each goal should be rigorous but attainable. Ms. Crooks indicated that goal percentages could be modified to reflect this strategy. She also indicated that by attaining the established goals in Attendance, Graduation Rates and Career Readiness, the school would exit out of CSI and enter A-TSI (Additional Targeted Support and Improvement). A-TSI focuses only on low academic achievement. Mr. Marous stressed that the goals should be aligned to move the school to an A-TSI designation. She also explained that the action plans for every area of CSI are tied to an evidence based strategy. She highlighted the changes to be made within the School Counseling department in order to support attendance and engagement. The school's counselors would also be considered Success Coaches and would play a major role in new student orientation. The school would also continue utilizing the PASS climate survey in order to understand the "why" behind student behaviors first before developing interventions. Mr. Mort, High School Principal, explained the creation of a 9th Grade Academy which would deploy a dedicated group of teachers and counselors in order to build a support team tasked with increased academic proficiency and graduation rates. Ms. Crooks announced a \$10,000 grant that the school has received to cover the costs associated with dual credits (high school and college) and should give the school the ability to increase partnerships with post-secondary institutions. Certified staff would continue their Teacher Clarity work and there will be an effort to provide feedback to teachers in order to increase the rigor of asynchronous lessons. With regards to graduation rates, Mr. Pappaterra explained that the Student Services staff was conducting reviews of withdrawn students (WD-01) in order to determine if these students are enrolling elsewhere.

Mr. Marous asked for a motion to post to the school's website for public comment the Draft Comprehensive School Improvement Plan 2023-2024 with the modifications to the action plans to include rigorous but attainable goals and the Student Services quarterly review of WD01 coded withdrawals. Mr. Donahue made the motion; Mr. Marous seconded – so moved.

Ayes: 2

Opposed: 0

v. Student Resolution

Dr. Leiterra indicated that no further information was available at this time. Mr. Marous tabled the discussion.

vi. Organizational Chart Update

Dr. Leiterra presented the organizational chart for SY 2023-2024 which reflects direct supervision of the Principals under the Chief Academic Officer. This would build upon vertical alignment and would enable a clear, concise academic voice.

H. Reminder of Next Board Meeting

To be held at the Pennsylvania Distance Learning Charter School and by teleconference on June 26, 2023.

**Board of Trustees Meeting for
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I. Executive Session (if necessary)

The meeting adjourned at 4:02 p.m. and moved into Executive Session.

MINUTES CERTIFICATION

Proposed minutes respectfully submitted.

Leigh Anne Lord

Recording Secretary, Leigh Anne Lord

06/26/2023

Date

William Donahue

Board Secretary, William Donahue

6-26-23

Date

PDE-414		Pennsylvania Distance Learning Charter School			SY 2022-23 August 1, 2023			
Complete the following information for all professional staff members.								
Staff No.	Name of employee (List all names in alphabetical order)	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 Assignment	Percentage of Time in Certified Position	Percentage of Time in Areas Not Certified	
1	August, Cassandra	Elementary & Secondary School Counselor PK-12	K-1	School Counselor	40 per week	100%	0%	
2	Ault, Brina	Special Education PK-8; Grades PK-4	K-8	Special Education Teacher	40 per week	100%	0%	
3	Azzaro, Susannah	Bus- Computer-Info Tech K-12; English 7-12, Computer Science 7-12	9-12	Business Technology Teacher	40 per week	100%	0%	
4	Barr, Nicholas	English 7-12	9-12	Secondary English Teacher	40 per week	100%	0%	
5	Bate, Jamie	School Speech & Language Pathologist PK-12	K-12	Speech Pathologist	40 per week	100%	0%	
6	Batrack, Felicia	Special Education PK-8; Grades PK-4	6	Special Education Teacher	40 per week	100%	0%	
7	Bauman, Margaret	Elementary K-6	6	Middle School Science Teacher	40 per week	100%	0%	
8	Bigos, Joanna	Elementary School Counselor K-6, Secondary School Counselor 7-12; Principal PK-12	K-12	Behavior Specialist	40 per week	100%	0%	
9	Billetdeaux, Alexa	Social Studies 7-12	9-12	Secondary Social Studies Teacher	40 per week	100%	0%	
10	Blose, Sarah	Special Education N-12	9-12	Special Education Teacher	40 per week	100%	0%	
11	Borghetti, Lauren	English 7-12; Biology 7-12	8	Middle School English Teacher	40 per week	100%	0%	
12	Bowman, Courtney	Early Childhood N-3; Elementary K-6	1	Elementary Teacher 1st Grade	40 per week	100%	0%	
13	Brecht, Joseph	Social Studies 7-12; General Science 7-12	9-12	Graduation Recovery Teacher	40 per week	100%	0%	
14	Brenc, Catherine	Mathematics 7-12	6-8	Middle School Mathematics Teacher	40 per week	100%	0%	
15	Brennen, Coleen	Biology 7-12; General Science 7-12; Family Consumer Science K-12	9-12	Graduation Recovery Teacher	40 per week	100%	0%	
16	Budd, Laura	Special Education PK-12; Principal PK-12; Elementary K-6	K-12	Career to Work Coordinator	40 per week	100%	0%	
17	Buncic, Kara	Elementary & Secondary School Counselor PK-12	9-12	School Counselor	40 per week	100%	0%	
18	Butter, Marissa	Elementary PK-4; English as a Second Language	K-12	ESL Coordinator	40 per week	100%	0%	
19	Caldone, Denise	Inst Technology Specialist PK-12; Supvr Curriculum & Inst PK-12; Principal PK-12; Mathematics 7-12	K-12	Title I Teacher	40 per week	100%	0%	
20	Campbell, Mackenzie	English 7-12; Grades 4-6; ELA 7-8	5	Elementary Teacher 5th Grade Social Studies	40 per week	100%	0%	
21	Carpenter, Elisa	Music PK-12	6-8	Music Teacher	40 per week	100%	0%	
22	Chavers, Jessica	Grades PK-4	3	Elementary Teacher 3rd Grade ELA	40 per week	100%	0%	
23	Chuong, Gabriella	Grades PK-4; Reading Specialist PK-12	4	Elementary Teacher 4th Grade Science and Social Studies	40 per week	100%	0%	
24	Clutter, Karen	Health K-12; Special Education N-12	9-12	Graduation Recovery Teacher	40 per week	100%	0%	
25	Colbert, Jessica	Mental or Phys Handicapped K-12; Principal PK-12; Reading Specialist PK-12	9-12	Instructional Specialist	40 per week	100%	0%	
26	Colbert, Tracey	Bus- Computer-Info Tech K-12; Social Studies 7-9; General Science 7-12; Math 7-9; Chemistry 7-12; Physics 7-12	9-12	Secondary Science Teacher	40 per week	100%	0%	
27	Collins, Kelly	Chemistry 7-12; Biology 7-12; Earth and Space Science 7-12	9-12	Secondary Science Teacher	40 per week	100%	0%	
28	Contos, Tanya	Elementary K-6; Citizenship 6-9; English 6-9; Supvr Curriculum & Inst PK-12	K-12	Curriculum & Instruction Coordinator	40 per week	100%	0%	
29	Corcoran, Madison	Social Studies 7-12; Special Education 7-12	9-12	Special Education Teacher	40 per week	100%	0%	

Staff No.	Name of employee (List all names in alphabetical order)	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 Assignment	Percentage of Time in Certified Position	Percentage of Time in Areas Not Certified
30	Crandall, Kimberly	Principal PK-12	6-8	Middle School Principal	40 per week	100%	0%
31	Crooks, Kelly	English 7-12, Supvr Curriculum & Inst PK-12; Principal PK-12	K-12	Chief Academic Officer	40 per week	100%	0%
32	Cutler, Stephen	Social Studies 7-12	7	Middle School Social Studies Teacher	40 per week	100%	0%
33	Davis, Larissa	Grades PK-4	2	Elementary teacher	40 per week	100%	0%
34	Dayka, Matthew	English 7-12; Computer Science 7-12	9-12	Secondary English Teacher	40 per week	100%	0%
35	DeMark, Joyous	Music PK-12	K-2	Music Teacher	40 per week	100%	0%
36	DeRoner, Victoria	Instructional Tech Spec PK-12; Social Studies 7-12; Citizenship 7-12; Mid Level English 6-9	9-12	Secondary Social Studies Teacher/Technology Coach	40 per week	100%	0%
37	Donahue, Tamara	Elementary K-6; Special Education PK-12; Reading Specialist PK-12	K-12	Title I Teacher	40 per week	100%	0%
38	Donofrio, Lauren	English 7-12	9-12	Secondary English Teacher	40 per week	100%	0%
39	Dunn, Amy	Special Education PK-8; Special Education 7-12; Grades PK-4	8	Special Education Teacher	40 per week	100%	0%
40	Eshelman, Elaine	Mathematics 7-12	9-12	Secondary Mathematics Teacher	40 per week	100%	0%
41	Evanchak, Matthew	Elementary K-6; Special Education N-12; Reading Specialist PK-12	6	Middle School English Teacher	40 per week	100%	0%
42	Faith, Stephanie	Elementary K-6, School Psychologist PK-12; Principal PK-12	K-12	Special Education Coordinator	40 per week	100%	0%
43	Fanning, Lindsey	Mathematics 7-12	6-8	Instructional Specialist	40 per week	100%	0%
44	Floodstrom, Jennifer	Grades PK-4; Grades 5-6; English as a Second Language	6	Middle School Social Studies Teacher	40 per week	100%	0%
45	Fox, Amber	Art PK-12	K-2	Art Teacher	40 per week	100%	0%
46	Galando, Matthew	Elementary K-6; Special Education PK-12	8	Special Education Teacher	40 per week	100%	0%
47	Gates, Clare	English 7-12	9-12	Secondary English Teacher	40 per week	100%	0%
48	Gates, Matthew	Bus-Computer Info Tech PK-12; Computer Science 7-12	9-12	Business Technology and Computer Science Teacher	40 per week	100%	0%
49	George, Hannah	Grades PK-4	1	Elementary Teacher - 1st Grade	40 per week	100%	0%
50	Glancy, Melissa	Elementary K-6; Special Education PK-12	6-7	Special Education Teacher	40 per week	100%	0%
51	Glaser, Andrew	English 7-12	9-12	Secondary English Teacher	40 per week	100%	0%
52	Grossman, Angela	Special Education PK-12	9-12	Special Education teacher	40 per week	100%	0%
53	Grosso, Sherri	Biology 7-12; Chemistry 7-12	9-12	Secondary Science Teacher	40 per week	100%	0%
54	Gulish, Jackie	Elementary K-6; Special Education N-12; Early Childhood N-3	K-12	Special Education Teacher	40 per week	100%	0%
55	Harmon, Melissa	Elementary K-6	3	Elementary Teacher 3rd Grade - Math	40 per week	100%	0%
56	Hart, William	Music K-12; Mid Level Math 7-9; Mid Level Science 7-9; Special Ed PK-8; Grades PK-4	9-12	Music Teacher	40 per week	100%	0%
57	Hartford, Chelsea	Grades PK-4	5	Elementary Teacher 5th Grade - Science	40 per week	100%	0%

Staff No.	Name of employee (List all names in alphabetical order)	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 Assignment	Percentage of Time in Certified Position	Percentage of Time in Areas Not Certified
58	Hartmann, Katie	Social Studies 7-12; English as a Second Language; Safety/Drivers Ed 7-12	9-12	Secondary Social Studies Teacher, Drivers Education Teacher	40 per week	100%	0%
59	Harvey, Emma	Elementary & Secondary School Counselor PK-12	9-12	School Counselor	40 per week	100%	0%
60	Heiles, Katherine	English 7-12	9-12	Instructional Specialist	40 per week	100%	0%
61	Heinz, Leah	Special Education PK-8; Grades PK-4	K-2	Title I Teacher	40 per week	100%	0%
62	Hill, Merilu	Elementary & Secondary School Counselor PK-12	9-12	School Counselor	40 per week	100%	0%
63	Hoffman, Alyssa	Special Education PK-8; Grades PK-4	K-6	Special Education Teacher	40 per week	100%	0%
64	Hoffman, Aubrey	Occupational Therapist	K-12	Occupational Therapist	40 per week	100%	0%
65	Honaker, Karley	English 7-12	7-8	Middle School English Teacher	40 per week	100%	0%
66	Hughes, Kevin	Health & Physical Education PK-12; Computer Science 7-12	K-6	Physical Education/Health Teacher	40 per week	100%	0%
67	Iannessa, Maureen	Elementary K-6; Family and Consumer Science K-12	K-6	Title I Teacher	40 per week	100%	0%
68	Johnston, Maggie	English 7-12	9-12	Secondary English Teacher	40 per week	100%	0%
69	Jones, Lydia	Social Studies 7-12	8	Middle School Social Studies Teacher	40 per week	100%	0%
70	Jordan, Daryl	Art PK-12	6-8	Art Teacher	40 per week	100%	0%
71	Kelly Brown, Maggie	English 7-12	9-12	Secondary English Teacher	40 per week	100%	0%
72	Kist, Jordan	Elementary & Secondary School Counselor PK-12	2-3	School Counselor	40 per week	100%	0%
73	Klieffen, Michelle	Mathematics 7-12; Special Education K-12; English 7-12; Early Childhood N-3	9-12	Secondary Mathematics Teacher	40 per week	100%	0%
74	Kocuba, Nicholas	Mathematics 7-12; Safety/Drivers Ed 7-12; Principal PK-12	K-12	Chief Operations Officer	40 per week	100%	0%
75	Korber, Jeffrey	Mathematics 7-12	9-12	Secondary Mathematics Teacher	40 per week	100%	0%
76	Kruger, Jodi	Library Science PK-12; Special Education PK-12; English 7-12; Social Studies 7-12	9-12	Secondary Social Studies Teacher	40 per week	100%	0%
77	Krokonko, Noah	Social Studies 7-12; Special Education K-12	9-12	Special Education Teacher	40 per week	100%	0%
78	Lamberton, Alyson	Elementary & Secondary School Counselor PK-12	4-5	School Counselor	40 per week	100%	0%
79	Latsko, Jenna	Mathematics 7-12	9-12	Secondary Mathematics Teacher	40 per week	100%	0%
80	Lawrence, Julie	Art K-12	3-5	Art Teacher	40 per week	100%	0%
81	Leitera, Michael	Principal PK-12; Social Studies 7-12; LOE Superintendent PK-12	K-12	CEO	40 per week	100%	0%
82	Levenson, Ashley	Elementary PK-4; Special Education K-8	5	Special Education Teacher	40 per week	100%	0%
83	Lingayat, Emily	Biology 7-12	9-12	Secondary Science Teacher	40 per week	100%	0%
84	Lowry, Brianna	Spanish PK-12	9-12	Spanish Teacher	40 per week	100%	0%
85	Martin, Stacy	Elementary K-6; Reading Specialist PK-12; Special Education PK-12	9-12	Special Education Teacher	40 per week	100%	0%
86	Mayle, Andrew	Mathematics 7-12	9-12	Secondary Mathematics Teacher	40 per week	100%	0%

Staff No.	Name of employee (List all names in alphabetical order)	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 Assignment	Percentage of Time in Certified Position	Percentage of Time in Areas Not Certified
87	McCormick, Megan	Health & Physical Education PK-12	K-2	Physical Education/Health Teacher	40 per week	100%	0%
88	McNeil, Laura	Nurse (contracted 1099 employee)	K-12	Nurse	20 per month	100%	0%
89	Metz, Valerie	Special Education PK-8; Special Education 7-12; Grades PK-4	9-12	Special Education Teacher	40 per week	100%	0%
90	Middlemiss, Kenneth	Grades PK-4; Grades 5-6	5	Elementary Teacher 5th Grade - ELA	40 per week	100%	0%
91	Mihoerck, Katie	Elementary & Secondary School Counselor PK-12	9-12	School Counselor	40 per week	100%	0%
92	Miller, Teare	Grades PK-4; Special Education PK-8	K-6	Title I Teacher	40 per week	100%	0%
93	Morrone, Michael	Art PK-12	3-5	Art Teacher	40 per week	100%	0%
94	Mort, Charles	Elementary PK-6; Principal PK-12	9-12	High School Principal	40 per week	100%	0%
95	Mort, Michelle	School Nurse	K-12	Nurse	24 per week	100%	0%
96	Mudd, Beth	Elementary K-6	2	Elementary Teacher 2nd Grade	40 per week	100%	0%
97	Mulvey, Kerianne	Grades PK-4; Special Education PK-8	K-2	Special Education Teacher	40 per week	100%	0%
98	Murray, Spencer	Elementary & Secondary School Counselor PK-12	8	School Counselor	40 per week	100%	0%
99	Mysels, Peter	Social Studies 7-12; Inst Technology Specialist PK-12	9-12	Secondary Social Studies Teacher	40 per week	100%	0%
100	Naugle, Crystal	Elementary K-6; Special Education N-12; Reading Specialist PK-12	2	Elementary Teacher 2nd Grade	40 per week	100%	0%
101	Ochs, Megan	Biology 7-12	9-12	Secondary Science Teacher	40 per week	100%	0%
102	Olszewski, Sara	Elementary K-6; Special Education PK-8; Special Education 7-12; English 7-12	9-12	Special Education Teacher	40 per week	100%	0%
103	Otis, Janine	Special Education PK-12	9-12	Special Education Teacher	40 per week	100%	0%
104	Patxot, Angela	Spanish PK-12; English 7-12; French PK-12	K-12	French Teacher	40 per week	100%	0%
105	Payne, Brandon	Elementary & Secondary School Counselor PK-12	K-5	Instructional Specialist	40 per week	100%	0%
106	Perhac, Tyler	English 7-12	9-12	Graduation Recovery Teacher	40 per week	100%	0%
107	Petraglia, Marisa	7-12 Social Studies; 7-12 English; Family Consumer Science PK-12	9-12	Secondary Social Studies Teacher; Technology Coach	40 per week	100%	0%
108	Piccifoco, Matthew	Citizenship 7-12; Elementary K-6; Social Studies 7-12; Mid Level Math 6-9	6-8	Title I Teacher	40 per week	100%	0%
109	Piskurich, Karli	Grades PK-4; Special Education PK-12	4	Elementary Teacher 4th Grade ELA	40 per week	100%	0%
110	Ploesch, Aubrey	Mathematics 6-9; Music PK-12; Principal PK-12	K-5	Elementary Principal	40 per week	100%	0%
111	Pollock, Paul	Grades 4-8 (all subjects 4-6); English 7-8; Math 7-8	8	Middle School Mathematics Teacher	40 per week	100%	0%
112	Pontius, Brad	Health & Physical Education PK-12	9-12	Physical Education/Health Teacher	40 per week	100%	0%
113	Potts, Bryce	Social Studies 7-12	9-12	Graduation Recovery Teacher	40 per week	100%	0%
114	Prementine, Kaylee	Special Education PK-8; Grades PK-4	1	Elementary Teacher 1st Grade	40 per week	100%	0%
115	Protho, Amy	Principal K-12; Elementary & Secondary School Counselor PK-12	7	School Counselor	40 per week	100%	0%
116	Rauenzahn, Mandy	Elementary & Secondary School Counselor PK-12	9-12	School Counselor	40 per week	100%	0%

Staff No.	Name of employee (List all names in alphabetical order)	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 Assignment	Percentage of Time in Certified Position	Percentage of Time in Areas Not Certified	
117	Reda, Tony	Health & Physical Education PK-12	6-8	Physical Education/Health Teacher	40 per week	100%	0%	
118	Rogers, Erin	Special Education K-12	9-12	Special Education Teacher	40 per week	100%	0%	
119	Roman, Gabriel	Mathematics 7-12	9-12	Secondary Mathematics Teacher	40 per week	100%	0%	
120	Rooney, Caroline	Grades PK-4; Special Education PK-8	3	Elementary Teacher 3rd Grade Social Studies and Science	40 per week	100%	0%	
121	Rossetti, Patricia	Principal K-12; Social Studies 7-12; LOE Superintendent PK-12	K-12	CEO	40 per week	100%	0%	
122	Ruffin, Kacy	Elementary & Secondary School Counselor PK-12	6	School Counselor	40 per week	100%	0%	
123	Rumble, Evan	Art K-12	9-12	Art Teacher	40 per week	100%	0%	
124	Sabol, Stephanie	Health & Physical Education PK-12	3-4	Physical Education/Health Teacher	40 per week	100%	0%	
125	Sapp, Jessica	Music K-12	3-5	Music Teacher	40 per week	100%	0%	
126	Scotto, Deanna	Elementary K-6	K-6	Title I Teacher	40 per week	100%	0%	
127	Sellinger, Samantha	General Science 7-12; Biology 7-12	9-12	Secondary Science Teacher	40 per week	100%	0%	
128	Simmons, Sarah	General Science 7-12; Principal K-12	6	Middle School Science Teacher	40 per week	100%	0%	
129	Smialek, Carol	Social Studies 7-12; English 7-12	K-5	Instructional Specialist	40 per week	100%	0%	
130	Smith, Brianna	Special Education PK-8; Grades PK-4	K-12	Special Education Teacher	40 per week	100%	0%	
131	Smith, Stephanie	Health & Physical Education PK-12	8	Physical Education/Health Teacher	40 per week	100%	0%	
132	Steele, Aimee	Early Childhood N-3; Elementary K-6	4	Elementary Teacher 4th Grade Math	40 per week	100%	0%	
133	Thornton, Amy	Special Education PK-12; Elementary K-6	K-12	Research and Development Coordinator	40 per week	100%	0%	
134	Trudeau, Christine	Elementary K-6; English 7-12; Mental or Phys Handicapped	7	Middle School English Teacher	40 per week	100%	0%	
135	Turocy, Alaina	Biology 7-12	9-12	Secondary Science Teacher	40 per week	100%	0%	
136	Vatter, Kristopher	Art PK-12	K-2	Art Teacher	40 per week	100%	0%	
137	Vertulla Julia	Grades 4-6 (all subjects); Mathematics 7-8	6	Middle School Mathematics Teacher	40 per week	100%	0%	
138	Vilella, Vanessa	Grades PK-4	K	Elementary Teacher Kindergarten	40 per week	100%	0%	
139	Waldron, Rashonda	Elementary K-6	K-5	Title I Teacher	40 per week	100%	0%	
140	Wallace, Michelle	Grades PK-4	K	Elementary Teacher Kindergarten	40 per week	100%	0%	
141	Watenpool, Amy	Elementary K-6; Early Childhood N-3; Special Education N-12	9-12	Special Education Teacher	40 per week	100%	0%	
142	White, Chelsea	Special Education PK-8; Grades PK-4; Special Education 7-12	9-12	Special Education Teacher	40 per week	100%	0%	

Staff No.	Name of employee (List all names in alphabetical order)	Areas of Certification Type of Certificate	Grades Teaching or Serving	All Areas of Assigjment Subject Areas Teaching or Services Provided	Number of Hours Worked in Assignment	Percentage of Time in Certified Position	Percentage of Time in Areas Not Certified	
143	Wier, Christine	Reading Specialist PK-12; Special Education N-12; Mid Level Mathematics 7-9	6-12	Reading Specialist	40 per week	100%	0%	
144	Wierdak, Lisa	Elementary K-6; Special Education PK-8; Exceptional Case Special Education 7-12	7	Special Education Teacher	40 per week	100%	0%	
145	Wilfert, Samantha	Special Education PK-1; Mid Level Math 6-9; Mid Level English 6-9; Elementary K-6; Early Childhood N-3	5	Elementary Teacher 5th Grade - Mathematics	40 per week	100%	0%	
146	Winter, Adam	Grades PK-4; Special Education K-8	4	Special Education Teacher	40 per week	100%	0%	
147	Wisniewski, Alan-Michael	Grades 4-6 (all subjects); Mathematics 7-8	7	Middle School Mathematics Teacher	40 per week	100%	0%	
148	Zenone, Daniella	Special Education PK-8; Grades PK-4	9-12	Special Education Teacher	40 per week	100%	0%	
Total Number of Administrators (do not include CEO) 7					CEO (certified) 2			
Total Number of Teachers 115 Counselors: 10 School Nurses: 2 Others: 12								
Total Number of Professional Staff : 148								
PA Department of Education, 333 Market Street, Harrisburg, PA 17126-0333								

**Preliminary Statement of Revenues, Expenditures
Include ALL Funds
as of June 30, 2023**

Name of School: Pennsylvania Distance Learning Charter School

Address of School 2605 Nicholson Road, Suite 4100, Sewickley, PA 15143

CEO Signature 

REVENUES

6000		REVENUE FROM LOCAL SOURCES
6500		EARNINGS ON INVESTMENTS
	6510	Interest on Investments and Interest-Bearing Checking Accounts
	6520	Dividends on Investments
	6530	Gains or Losses on Sale of Investments
	6540	Earnings on Investments in Real Property
	6590	Other Earnings or Investments
6600		FOOD SERVICE REVENUE
	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
6700		REVENUES FROM STUDENT ACTIVITIES
	6710	Admissions
	6720	Bookstore Sales
	6730	Student Organization Membership Dues and Fees
	6740	Fees
	6750	Student Activity - Special Events
	6790	Other Student Activity Income
6800		REVENUES FROM INTERMEDIARY SOURCES / PASS THROUGH
	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

6900		OTHER REVENUE FROM LOCAL SOURCES
	6910	Rentals
	6920	Contributions & Donations from Private Sources / Capital Contributions
	6930	Gains or Losses on Sale of Fixed Assets (Economic Resource Measurement Focus Only)
	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
	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 Above
	6970	Services Provided Other Funds
	6980	Revenue from Community Service Activities
	6990	Refunds and Other Miscellaneous Revenue
	6991	Refunds of a Prior Year Expenditure
	6999	Other Revenues Not Specified Above
7000		REVENUE FROM STATE SOURCES
7100		BASIC INSTRUCTIONAL AND OPERATING SUBSIDIES
	7150	Unassigned
	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 ACCOUNTS
		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
8000			REVENUE FROM FEDERAL SOURCES
8100			UNRESTRICTED GRANTS-IN-AID DIRECT FROM THE FEDERAL GOVERNMENT
	8110		Payments for Federally Impacted Areas - P.L. 81-874
	8190		Other Unrestricted Federal Grants-in-Aid Direct from the Federal Government
8200			UNRESTRICTED GRANTS-IN-AID FROM THE FEDERAL GOVERNMENT THROUGH THE COMMONWEALTH
8300			RESTRICTED GRANTS-IN-AID DIRECTLY FROM THE FEDERAL GOVERNMENT
	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 Government
8500		RESTRICTED GRANTS-IN-AID FROM THE FEDERAL GOVERNMENT THROUGH THE COMMONWEALTH FOR THE INDIVIDUALS WITH DISABILITIES EDUCATION ACT (IDEA), NO CHILD LEFT BEHIND (NCLB), VOCATIONAL EDUCATION, CHILD NUTRITION AND CAREER EDUCATION PROGRAMS
	8510	Individuals with Disabilities Education Act (IDEA) and No Child Left Behind (NCLB)
	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
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
8700		FEDERAL STIMULUS FUNDING
	8740	CARES Act, CRRSA Act, and ARP Act Funding
8800		MEDICAL ASSISTANCE REIMBURSEMENTS
9000		OTHER FINANCING SOURCES
9100		SALE OF BONDS
	9110	Bond Issue Proceeds (Gross)
	9120	Proceeds from Refunding of Bonds
9200		PROCEEDS FROM EXTENDED TERM FINANCING

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 GOVERNMENTS
	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
TOTAL REVENUES			

Preliminary Statement of Revenues, Expenditures & Fund Balances
 Include ALL Funds
 as of June 30, 2023

Name of School: Pennsylvania Distance Learning Charter School

Address of School: 2605 Nicholson Road, Suite 4100, Sewickley, PA 15143

CEO Signature Michael Leitner

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

EXPENDITURES

1000		INSTRUCTION	
1100		REGULAR PROGRAMS - ELEMENTARY / SECONDARY	9,947,093.00
			0.00
1200		SPECIAL PROGRAMS - ELEMENTARY / SECONDARY	3,865,840.00
			0.00
1300		VOCATIONAL EDUCATION	0.00
			0.00
1400		OTHER INSTRUCTIONAL PROGRAMS - ELEMENTARY / SECONDARY	102,321.00
			0.00
1600		ADULT EDUCATION PROGRAMS	0.00
			0.00
1700		HIGHER EDUCATION PROGRAMS	0.00
			0.00
1800		PRE-KINDERGARTEN	0.00
			0.00
2000		SUPPORT SERVICES	0.00
2100		SUPPORT SERVICES - PUPIL PERSONNEL	0.00
	2110	Supervision of Pupil Personnel Services	0.00
	2120	Guidance Services	0.00
	2130	Attendance Services	0.00
	2140	Psychological Services	0.00
	2150	Speech Pathology and Audiology Services	0.00
	2160	Social Work Services	0.00
	2170	Student Accounting Services	0.00
	2190	Other Pupil Personnel Services	3,942,162.00
			0.00
2200		SUPPORT SERVICES - INSTRUCTIONAL STAFF	0.00
	2210	Supervision of Educational Media Services	0.00

	2220	Technology Support Services	0.00
	2230	Educational Television Services	0.00
	2240	Computer-Assisted Instruction Support Services	0.00
	2250	School Library Services	0.00
	2260	Instruction and Curriculum Development Services	0.00
	2270	Instructional Staff Professional Development Services	0.00
	2280	Nonpublic Support Services	0.00
			0.00
2300		SUPPORT SERVICES - ADMINISTRATION	0.00
	2310	Board Services	0.00
	2320	Board Treasurer Services	0.00
	2340	Staff Relations and Negotiations Services	0.00
	2350	Legal Services	39,260.00
	2360	Office of the Superintendent (Executive Director) Services	0.00
	2370	Community Relations Services	674,817.00
	2380	Office of the Principal Services	2,857,460.00
	2390	Other Administration Services	0.00
			0.00
2400		SUPPORT SERVICES - PUPIL HEALTH	123,735.00
			0.00
2500		SUPPORT SERVICES - BUSINESS	0.00
	2510	Fiscal Services	773,893.00
	2520	Purchasing Services	0.00
	2530	Warehousing and Distributing Services	0.00
	2540	Printing, Publishing and Duplicating Services	0.00
	2590	Other Support Services - Business	1,157.00
			0.00
2600		OPERATION AND MAINTENANCE OF PLANT SERVICES	1,448,487.00
	2610	Supervision of Operation and Maintenance of Plant Services	0.00
	2620	Operation of Buildings Services	0.00
	2630	Care and Upkeep of Grounds Services	0.00
	2640	Care and Upkeep of Equipment Services	0.00
	2650	Vehicle Operations and Maintenance Services (Other than Student Transportation Vehicles)	0.00
	2660	Security Services	0.00
	2690	Other Operation and Maintenance of Plant Services	0.00
			0.00
2700		STUDENT TRANSPORTATION SERVICES	0.00
	2710	Supervision of Student Transportation Services	0.00
	2720	Vehicle Operation Services	0.00
	2730	Monitoring Services	0.00
	2740	Vehicle Servicing and Maintenance Services	0.00
	2750	Nonpublic Transportation	0.00

	2790	Other Student Transportation Services	0.00
			0.00
2800		SUPPORT SERVICES - CENTRAL	0.00
	2810	Planning, Research, Development and Evaluation Services	0.00
	2820	Information Services	0.00
	2830	Staff Services	0.00
	2840	Data Processing Services	0.00
	2850	State and Federal Agency Liaison Services	0.00
	2860	Management Services	0.00
	2890	Other Support Services Central	0.00
			0.00
2900		OTHER SUPPORT SERVICES - CENTRAL	0.00
	2990	Pass-Thru Funds	0.00
			0.00
3000		OPERATION OF NON-INSTRUCTIONAL SERVICES	0.00
3100		FOOD SERVICES	0.00
			0.00
3200		STUDENT ACTIVITIES	29,418.00
	3210	School Sponsored Student Activities	0.00
	3250	School Sponsored Athletics	0.00
			0.00
3300		COMMUNITY SERVICES	70,764.00
	3310	Community Recreation	0.00
	3320	Civic Services	0.00
	3330	Public Library Services	0.00
	3340	Custody and Child Care	0.00
	3350	Welfare Activities	0.00
	3390	Other Community Services	0.00
			0.00
3400		SCHOLARSHIPS AND AWARDS	0.00
			0.00
4000		FACILITIES ACQUISITION, CONSTRUCTION AND IMPROVEMENT SERVICES	0.00
4100		SITE ACQUISITION SERVICES - ORIGINAL AND ADDITIONAL	0.00
			0.00
4200		EXISTING SITE IMPROVEMENT SERVICES	0.00
			0.00
4300		ARCHITECTURE AND ENGINEERING SERVICES / EDUCATIONAL SPECIFICATIONS DEVELOPMENT - ORIGINAL AND ADDITIONAL	0.00
			0.00
4400		ARCHITECTURE AND ENGINEERING SERVICES / EDUCATIONAL SPECIFICATIONS - IMPROVEMENTS	0.00
			0.00

4500	BUILDING ACQUISITION AND CONSTRUCTION SERVICES - ORIGINAL AND ADDITIONAL	0.00
		0.00
4600	EXISTING BUILDING IMPROVEMENT SERVICES	0.00
		0.00
5000	OTHER EXPENDITURES AND FINANCING USES	0.00
5100	DEBT SERVICE / OTHER EXPENDITURES AND FINANCING USES	12,940.00
		0.00
5200	FUND TRANSFERS	0.00
		0.00
5300	TRANSFERS INVOLVING COMPONENT UNITS	0.00
		0.00
5400	INTRAFUND TRANSFERS OUT	0.00
		0.00
5800	SUSPENSE ACCOUNT	0.00
		0.00
5900	BUDGETARY RESERVE	0.00
		0.00
		0.00
TOTAL EXPENDITURES		23,889,347.00

**TOTAL REVENUES MINUS TOTAL EXPENDITURES = CURRENT FUND
BALANCE AS OF JUNE 30, 2023**

PENNSYLVANIA DISTANCE
LEARNING CHARTER SCHOOL

FINANCIAL STATEMENTS
AND SUPPLEMENTARY INFORMATION

June 30, 2022

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December 15, 2022

To the Board of Trustees
Pennsylvania Distance Learning Charter School
Sewickley, Pennsylvania

Independent Auditor's Report

Report on the Audit of the Financial Statements

Opinion

We have audited the accompanying financial statements of the governmental activities of the General Fund of Pennsylvania Distance Learning Charter School (the School), as of and for the year ended June 30, 2022, and the related notes to the financial statements, which collectively comprise the School's basic financial statements as listed in the table of contents.

In our opinion, the financial statements referred to above present fairly, in all material respects, the respective financial position of the governmental activities of the General Fund of Pennsylvania Distance Learning Charter School as of June 30, 2022, and the respective changes in financial position for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

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

Responsibilities of Management for the Financial Statements

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

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about Pennsylvania Distance Learning Charter School's ability to continue as a going concern for twelve months beyond the financial statement date, including any currently known information that may raise substantial doubt shortly thereafter.

Auditor's Responsibilities for the Audit of the Financial Statements

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

In performing an audit in accordance with generally accepted auditing standards and *Government Auditing Standards*, we:

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

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

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that the management's discussion and analysis on pages 4-10, budgetary comparison information on page 36, schedule of proportionate share of the net pension liability on page 37, schedule of proportionate share of the net OPEB liability on page 38, and schedule of proportionate OPEB contributions on page 39 be presented to supplement the basic financial statements. Such information is the responsibility of management and, 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.

Supplementary Information

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise Pennsylvania Distance Learning Charter School's basic financial statements. The accompanying schedule of expenditures of federal awards, as required by *Title 2 U.S. Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, is presented for purposes of additional analysis 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 December 15, 2022, on our consideration of Pennsylvania Distance Learning 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 solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of Pennsylvania Distance Learning Charter School's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Pennsylvania Distance Learning Charter School's internal control over financial reporting and compliance.

Hill, Barth & King LLC

Certified Public Accountants

Management's Discussion and Analysis

As management of the Pennsylvania Distance Learning Charter School (the "School"), a charter school, we offer readers of our financial statements this narrative overview and analysis of the financial activities of the Pennsylvania Distance Learning Charter School for the fiscal year ended June 30, 2022. The intent of this discussion and analysis is to look at the School's financial performance as a whole. Readers should also review the basic financial statements and the notes to the financial statements to enhance their understanding of the School's financial performance.

The Management's Discussion and Analysis ("MD&A") is an element of the reporting model adopted by the Governmental Accounting Standards Board (GASB) in their Statement No. 34, *Basic Financial Statements – and Management's Discussion and Analysis – for State and Local Governments* issued June 1999. Certain comparative information between the current year and the prior year is required to be presented in the MD&A.

Financial Highlights

- In accordance with GASB 68, the School is reporting its share of the June 30, 2021 total PSERS pension liability calculated at \$8,170,000.
- In accordance with GASB 75, the School is reporting its share of the June 30, 2021 total OPEB liability calculated at \$472,000.
- In total, net position increased \$2,185,381, which represents a 48 percent increase compared to 2021. This increase was primarily related to an increase in current year district revenues.
- Total assets increased \$11,154,332, which represents an 83 percent increase from 2021. This increase was due to the increase in cash and cash equivalents from operations and the adoption of Statement No. 87 which added \$8,481,658 of lease right-of-use assets to the statement.
- Total liabilities increased \$8,827,599, which represents an 83 percent increase from 2021. The increase in liabilities is due to the adoption of Statement No. 87 which added \$9,092,566 of lease liabilities to the statement.

Overview of the Financial Statements

This discussion and analysis is intended to serve as an introduction to the School's basic financial statements. These basic financial statements comprise three components: 1) Government-Wide Financial Statements, 2) Fund Financial Statements, and 3) Notes to the Financial Statements.

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 private-sector business.

The Statement of Net Position presents information on all of the School's assets and liabilities, with the difference between the two 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. Thus, revenues and expenses are reported in this statement for some items that will only result in cash flow changes in future fiscal periods (e.g., items purchased but not paid for).

Pennsylvania Distance Learning Charter School
Management's Discussion and Analysis

The governmental activities of the School include Instruction and Support Services.

The Government-Wide Financial Statements can be found on pages 11-12 of this report.

Fund Financial Statements

A fund is a grouping of related accounts that is used to maintain control over resources that have been segregated for specific activities or objectives. The School, like other local governments, uses fund accounting to ensure and demonstrate compliance with finance-related legal requirements. All of the funds of the School for the current year are governmental funds.

Governmental Funds

Governmental fund financial statements focus on near-term inflows and outflows of spendable resources, as well as on balances of spendable resources available to the end of the fiscal year. Such information may be useful in evaluating the School's near-term financing requirements.

The School maintains only a General Fund, which is considered a major fund. Information is presented in the Governmental Funds Balance Sheet and the Governmental Funds Statement of Revenues, Expenditures, and Changes in Fund Balances.

The School prepares a General Fund budget. Statements have been provided that compare actual results to this budget.

Government-Wide Financial Analysis

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 exceeded liabilities by \$6,759,565 at the close of its fiscal year. It is important to note that this equity includes \$8,642,000 of Net Pension and OPEB liabilities.

Statement of Net Position

The Statement of Net Position answers the question of how the School did financially during fiscal year 2022. This statement includes all assets and liabilities, both financial and capital, and short-term and long-term, using the accrual basis of accounting and economic resources focus, which is similar to the accounting used by most private-sector companies. This basis of accounting takes into account all revenues and expenses during the year, regardless of when the cash is received or paid.

Pennsylvania Distance Learning Charter School
 Management's Discussion and Analysis

Table 1 provides a summary of the School's Net Assets for the fiscal years 2022 and 2021:

(Table 1)
Summary Statements of Net Position

	<u>2022</u>	<u>2021</u>
Current Assets	\$ 13,485,093	\$ 10,820,951
Noncurrent Assets	<u>11,077,772</u>	<u>2,587,582</u>
Total Assets	<u>24,562,865</u>	<u>13,408,533</u>
Deferred Outflows of Resources Related to Pension and OPEB	<u>3,134,141</u>	<u>2,100,493</u>
Current Liabilities	1,787,875	1,675,366
Noncurrent Liabilities	<u>16,656,855</u>	<u>9,019,476</u>
Total Liabilities	<u>18,444,730</u>	<u>10,694,842</u>
Deferred Inflows of Resources Related to Pensions and OPEB	<u>1,415,000</u>	<u>240,000</u>
Investment in Capital Assets	1,514,629	1,506,573
Unrestricted Net Deficit	<u>5,244,936</u>	<u>3,067,611</u>
Total Net Position	<u>\$ 6,759,565</u>	<u>\$ 4,574,184</u>

Total assets increased \$11,154,332, which represents an 83 percent increase from 2021. This increase was due to an increase in the School's cash and cash equivalent and the adoption of Statement No. 87 which added \$8,481,658 of lease right-of-use assets to the statement. The increase in liabilities is primarily due to the adoption of Statement No. 87 which added \$9,092,566 of lease liabilities to the statement.

Capital Assets

At the end of fiscal year 2022, the School had \$1,514,629 in capital assets which represented an increase of \$8,056 from 2021. Table 2 shows the respective balance for fiscal year 2021.

(Table 2)

	<u>2022</u>	<u>2021</u>
Capital Assets, net	<u>\$ 1,514,629</u>	<u>\$ 1,506,573</u>

For more information on capital assets, see Note 2 in the Notes to the Basic Financial Statements.

Pennsylvania Distance Learning Charter School
 Management's Discussion and Analysis

Statement of Activities

(Table 3)

Changes in Net Position

	<u>2022</u>	<u>2021</u>
General Revenues:		
District Funding	\$ 22,242,356	\$ 22,090,667
Federal Entitlement Grants	2,564,615	1,284,882
State Reimbursement	87,580	26,351
Other	<u>12,268</u>	<u>36,482</u>
Total General Revenues	<u>24,906,819</u>	<u>23,438,382</u>
Expenses:		
Instruction	13,437,097	11,075,508
Support Services	7,064,744	6,695,759
Capital Expenses	1,688,688	511,789
Interest on Debt	<u>367,201</u>	<u>-</u>
Total Expenses	<u>22,557,730</u>	<u>18,283,056</u>
Change in Net Position	<u>\$ 2,349,089</u>	<u>\$ 5,155,326</u>

Table 3 shows the changes in net position for fiscal years 2022 and 2021, as well as a listing of revenues and expenses.

The reason for the increase in overall revenues in 2022 was primarily due to an increase in per-pupil allotment from 2021, as well as an increase in Federal entitlement grants resulting from CARES Act ESSER II and ARP ESSER awards. The School's expenses increased primarily as a result of increased personnel costs funded by the additional federal entitlements. As student enrollment increases, operating costs will increase proportionately.

**Statement of Revenues, Expenditures, and Changes in Fund Balances, Budget and Actual – General Fund
 For the Year Ended June 30, 2022**

(Table 4)
Change in Net Fund Balances, Budget and Actual

	<u>Budget</u>	<u>Actual</u>
Revenues:		
Local Revenues	\$ 19,441,665	\$ 22,254,624
State Revenues	24,881	87,580
Federal Revenues	<u>2,229,901</u>	<u>2,564,615</u>
Total Revenues	<u>21,696,447</u>	<u>24,906,819</u>
Expenditures:		
Instruction	13,025,989	13,439,194
Support Services	8,412,605	7,066,554
Capital Expenses	278,900	645,773
Debt Service	<u>1,600</u>	<u>1,203,189</u>
Total Expenses	<u>21,719,094</u>	<u>22,354,710</u>
Change in Fund Balance	<u>\$ (22,647)</u>	<u>\$ 2,552,109</u>

- Total actual revenues during 2022 were significantly higher, \$3,210,372, than the budget. The School anticipated, and budgeted, that cyber enrollment would decrease in fiscal year 2022 as traditional public schools returned to normal operations from COVID-19. This did not occur as budgeted and enrollment remained steady in 2022.
- Total actual expenses during 2022 were higher, \$635,615, than budgeted. The primary driver of this variance is the costs associated with debt service as a result of the adoption of Statement No. 87.

Financial Analysis of the School's Funds

As noted earlier, the School uses fund accounting to ensure and demonstrate compliance with finance-related legal requirements.

General Fund

In particular, unassigned fund balance is a useful measure of the School's net resources available for spending at the end of the fiscal year. As of the end of the current fiscal year, the School's general fund reported an ending Unassigned Fund Balance of \$2,036,042. This represents approximately 8.2% of the total year's funding, which will be available to the School in subsequent years.

Long-Term Debt

As of June 30, 2022, the School has no long-term debt.

Current Financial Issues

I. District Funding Receivable

In Pennsylvania, "cyber" charters (charter schools that provide distance learning education) are funded on the number of students enrolled in the School through payments received from the resident school district of the enrollee. Monies are paid by the resident school district based on an invoice that is issued by the School. The invoices are calculated differently for each student based on a combination of student entry date, published "tuition" rate for a particular District, and the number of billing periods remaining in the year.

The School billed 290 various Districts in fiscal year 2022. By year end, the School had collected approximately 98% of its billed revenues, as opposed to a 94% collection rate in fiscal year 2021.

II. Enrollment

For the school year ended June 30, 2022, the School had a final Average Daily Membership (ADM) of 1,364 students, generating \$22.2 million in billed revenues. In the coming year, enrollment (ADM) was budgeted at 1,400 students.

III. Miscellaneous Statistics

The following represents some miscellaneous financial statistics of the School during the 2021 fiscal year:

Number of Districts billed: 290

Number of Students served: 1,636 (had enrollment days at some point during the year)

Pennsylvania Distance Learning Charter School
Management's Discussion and Analysis

(Regular Education Funding)

Lowest District Funding Amount:	\$	8,917
Highest District Funding Amount:	\$	22,280
Average District Funding Amount:	\$	12,914

(Special Education Funding)

Lowest District Funding Amount:	\$	18,599
Highest District Funding Amount:	\$	57,371
Average District Funding Amount:	\$	29,621

Economic Factors and Next Year's Budgets and Rates

The fiscal and operational stability of our Commonwealth's charter schools is directly linked to the State of Pennsylvania's Budget and shifting political realities. This issue manifests itself most clearly in the way that the state determines each charter school's per pupil allotment which is calculated by student's school district of residence and form PDE-363. The PDE 363 uses a "state-determined" formula to calculate per pupil allotments. A host of anti-charter legislation proposed by the Governor and currently making its way through the Pennsylvania House and Senate threatens to further reduce charter school funding.

Though the charter school concept is widely recognized as a viable and necessary educational model, the issue concerning how charter schools are funded will likely remain controversial in the foreseeable future.

Requests for Information

This financial report is designed to provide a general overview of the Pennsylvania Distance Learning Charter School's finances for all those with an interest in the School's finances. Questions concerning any of the information provided in this report or requests for additional financial information should be addressed to the Fiscal Officer c/o Pennsylvania Distance Learning Charter School, 2605 Nicholson Road, Suite #4100, Sewickley, PA 15143.

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

STATEMENT OF NET POSITION

June 30, 2022

	<u>Governmental Activities</u>
<u>Assets</u>	
<u>Current Assets</u>	
Cash and Cash Equivalents	\$ 11,380,428
Certificates of Deposit	495,357
District Funding Receivable (Net of Allowance)	409,514
Grants Funding Receivable	826,211
Other Receivable	53,932
Prepaid Expenses	319,651
Total Current Assets	<u>13,485,093</u>
<u>Noncurrent Assets</u>	
Certificate of Deposit - Limited Use	1,058,475
Capital Assets (Net of Depreciation)	1,514,629
Leased Right-of-Use-Assets (Net of Amortization)	8,481,658
Security Deposits	23,010
Total Noncurrent Assets	<u>11,077,772</u>
Total Assets	<u>24,562,865</u>
<u>Deferred Outflows of Resources</u>	
Deferred Outflows of Resources Related to Pension and OPEB	<u>3,134,141</u>
<u>Liabilities</u>	
<u>Current Liabilities</u>	
Accounts Payable	586,290
Accrued Expenses	1,043,130
District Funding Payable	158,455
Lease Liability, Current Portion	1,077,711
Total Current Liabilities	<u>2,865,586</u>
<u>Noncurrent Liabilities</u>	
Lease Liability, Noncurrent	8,014,855
Net OPEB Liability	472,000
Net Pension Liability	8,170,000
Total Noncurrent Liabilities	<u>16,656,855</u>
Total Liabilities	<u>19,522,441</u>
<u>Deferred Inflows of Resources</u>	
Deferred Inflows of Resources Related to Pension and OPEB	<u>1,415,000</u>
<u>Net Position</u>	
Net Investment in Capital Assets	1,514,629
Unrestricted Net Assets	5,244,936
Total Net Position	<u>\$ 6,759,565</u>

See accompanying notes to financial statements

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

STATEMENT OF ACTIVITIES

Year ended June 30, 2022

<u>Functions/ Programs</u>	<u>Program Revenues</u>				<u>Net (Expense) Revenue and Change in Net Position</u>
	<u>Expenses</u>	<u>Charges for Services</u>	<u>Operating Grants and Contributions</u>	<u>Capital Grants and Contributions</u>	
Governmental Activities:					
Instruction	\$ 13,437,097	-	-	-	\$ (13,437,097)
Support Services	7,064,744	-	-	-	(7,064,744)
Depreciation	1,688,688	-	-	-	(1,688,688)
Interest	367,201	-	-	-	(367,201)
Total Governmental Activities	<u>\$ 22,557,730</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>(22,557,730)</u>
			General Revenues:		
			District Funding	22,242,356	
			Federal Entitlement Grants	2,564,615	
			State Reimbursements	87,580	
			Other	12,268	
			Total General Revenues	<u>24,906,819</u>	
			Change in Net Position		2,349,089
			Net Position, As Previously Reported		4,574,184
			Adoption of GASB 87		<u>(163,708)</u>
			Net Position, Beginning, As Restated		<u>4,410,476</u>
			Net Position, Ending		<u>\$ 6,759,565</u>

See accompanying notes to financial statements

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

BALANCE SHEET - GOVERNMENTAL FUNDS

June 30, 2022

	<u>General</u>
<u>Assets</u>	
Cash and Cash Equivalents	\$ 11,380,428
Certificates of Deposit	495,357
Certificates of Deposit - Limited Use	1,058,475
District Funding Receivable	409,514
Federal Receivable	826,211
Other Receivable	53,932
Prepaid Expenses	319,651
Security Deposits	23,010
Total Assets	<u><u>\$ 14,566,578</u></u>
 <u>Liabilities</u>	
Accounts Payable	\$ 586,290
Accrued Expenses	1,043,130
District Funding Payable	158,455
Total Liabilities	<u>1,787,875</u>
 <u>Fund Balances</u>	
Nonspendable	342,661
Committed	10,400,000
Unassigned	2,036,042
Total Fund Balances	<u>12,778,703</u>
Total Liabilities and Fund Balances	<u><u>\$ 14,566,578</u></u>

See accompanying notes to financial statements

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES -
GOVERNMENTAL FUNDS
Year ended June 30, 2022

	<u>General</u>
Revenues	
Local Revenues	\$ 22,254,624
State Revenues	87,580
Federal Revenues	2,564,615
	<hr/>
Total Revenues	24,906,819
	<hr/>
Expenditures	
Instruction	13,439,194
Support Services	7,066,554
Capital Expenses	645,773
Lease Right-of-Use Asset	2,198,080
Debt Service	1,203,189
	<hr/>
Total Expenditures	24,552,790
	<hr/>
Excess of revenues over expenditures	354,029
Other Financing Sources	
Lease Financing	2,198,080
	<hr/>
Total Other Financing Sources	2,198,080
	<hr/>
Net Change in Fund Balances	2,552,109
	<hr/>
Fund Balances--July 1, 2021	10,226,594
	<hr/>
Fund Balances--June 30, 2022	\$ 12,778,703
	<hr/> <hr/>

See accompanying notes to financial statements

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

**RECONCILIATION OF THE GOVERNMENTAL FUNDS BALANCE SHEET
TO THE STATEMENT OF NET POSITION**

June 30, 2022

Total Fund Balances per Fund Financial Statements	\$ 12,778,703
Capital assets are not reported in this fund financial statement because they are not current financial resources, but they are reported in the Statement of Net Position:	
Capital Assets	1,514,629
Leased Assets	8,481,658
Some liabilities, including lease liabilities, net pension and OPEB obligations, are not due and payable in the current period and, therefore, are not reported in the fund financial statement:	
Pension and OPEB	(8,642,000)
Lease Liability	(9,092,566)
Deferred outflows and inflows or resources related to pension and OPEB are applicable to future periods and, therefore, are not reported in the funds:	
Deferred inflows of resources related to pension and OPEB	(1,415,000)
Deferred outflows of resources related to pension and OPEB	<u>3,134,141</u>
Net Position for Governmental Activities	<u><u>\$ 6,759,565</u></u>

See accompanying notes to financial statements

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

**RECONCILIATION OF THE STATEMENT OF REVENUES EXPENDITURES AND
CHANGES IN FUND BALANCES OF GOVERNMENTAL FUNDS
TO THE STATEMENT OF ACTIVITIES**

June 30, 2022

Net Change in Fund Balances per Fund Financial Statements	\$ 2,552,109
Capital outlays are reported as expenditures in this fund financial statement because they are current financial resources, but they are presented as assets in the Statement of Activities and depreciated over their estimated economic lives.	645,773
Right-of-use leased assets used in governmental activities are not financial resources and therefore are not reported in the funds.	9,928,554
Depreciation and amortization expense on governmental capital assets and right-of-use assets are included in the governmental activities in the Statement of Activities.	(1,688,688)
Lease liabilities and payments on leases used in governmental activities are not financial resources and therefore are not reported in the funds.	
Lease liability recognized	(9,928,554)
Principal payments on lease liabilities	835,988
Governmental funds report School pension and OPEB contributions as expenditures. However in the statement of activities, the cost of pension and OPEB benefits earned net of employee contributions is reported as expense.	<u>3,907</u>
Change in Net Position of Governmental Activities	<u><u>\$ 2,349,089</u></u>

See accompanying notes to financial statements

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS

June 30, 2022

NOTE 1: ORGANIZATION

Pennsylvania Distance Learning Charter School (the "School") is a Pennsylvania corporation that began operations on July 1, 2004, pursuant to the PA Act 22 of 1997, to form and operate a cyber charter school within the Commonwealth of Pennsylvania. The School is an exempt organization for Federal income tax purposes under Section 501 (c)(3) of the Internal Revenue Code.

NOTE 2: SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Reporting Entity

The financial reporting entity consists of the School and organizations for which the School is financially accountable. All funds, organizations, institutions, agencies, departments and offices that are not legally separate are part of the School. In addition, any legally separate organization for which the School is financially accountable is considered part of the reporting entity. Financial accountability exists if the School appoints a voting majority of the organization's governing board and is able to impose its will on the organization, or if the organization provides benefits to, or imposes financial burdens on the School. Based on the application of these criteria, the School does not include additional organizations within its reporting entity, nor is the School a component unit of another entity.

Government-Wide and Fund Financial Statements

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

The government-wide financial statements (i.e. the Statement of Net Position and the Statement of Activities) report information on all of the non-fiduciary activities of the School. Governmental activities are normally supported by tuition and intergovernmental revenues.

The Statement of Net Position presents the financial condition of the governmental activities of the School at year-end. The Statement of Activities demonstrates the degree to which direct expenses of a given function or segments are offset by program revenues. *Direct expenses* are those that are clearly identifiable with a specific function or segment. *Program revenues* include 1) fees and charges to customers or applicants who purchase, use, or directly benefit from goods, services, or privileges provided by a given function or segment and 2) grants and contributions that are restricted to meeting the operational or capital requirements of a particular function or segment. Other items not properly included among program revenues are reported instead as *general revenues*.

Major individual governmental funds are reported in separate columns in the fund financial statements.

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS (CONTINUED)

June 30, 2022

NOTE 2: SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Measurement Focus, Basis of Accounting and Financial Statement Presentation

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

The 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 both 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 government considers revenues to be available if they are collected within 90 days of the end of the current fiscal period. Expenditures generally are recorded when a liability is incurred, as under accrual accounting. However, debt service expenditures, as well as expenditures related to compensated absences, and claims and judgments, are recorded only when payment is due. General capital asset acquisitions are reported as expenditures in governmental funds. Issuance of long-term debt and acquisitions under capital leases are reported as other financing sources.

Tuition and interest associated with the current fiscal period are considered to be susceptible to accrual and so have been recognized as revenues of the current fiscal period. Entitlements are recorded as revenues when all eligibility requirements are met, including any time requirements and the amount is received during the period or within the availability period for this revenue source (within 90 days of year-end). Expenditure-driven grants are recognized as revenue when the qualifying expenditures have been incurred and all other eligibility requirements have been met, and the amount is received during the period or within the availability period for this revenue source (within 90 days of year-end). All other revenue items are considered to be measurable and available only when cash is received by the government.

The School's accounts are organized and operated on the basis of funds. A fund is an independent fiscal accounting entity with a self-balancing set of accounts. Fund accounting segregates funds according to their intended purpose and is used to aid management in demonstrating compliance with finance-related legal and contractual provisions. The minimum number of funds maintained is consistent with legal and managerial requirements.

The School reports the following major governmental fund:

- The *General Fund* is the School's primary operating fund. It accounts for all financial resources of the School, except those required to be accounted for in another fund. There are no other funds reported by the School.

Amounts reported as program revenues include 1) charges to customers for goods, services, or privileges provided, 2) operating grants and contributions, and 3) capital grants and contributions. Internally dedicated resources are reported as general revenues rather than as program revenues.

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS (CONTINUED)

June 30, 2022

NOTE 2: SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Budget Information

Annual budgets are adopted for all funds on a basis consistent with GAAP. All annual appropriations lapse at fiscal year-end. The operating budget includes proposed expenditures and the means of financing them for the upcoming year, along with estimates for the current year and actual data for the preceding year.

Budgets are required for all funds by Pennsylvania State Statute. The budget includes proposed expenditures and the means of financing them. As required by law, prior to June 30, the budget is adopted by formal resolution.

Formal budgetary integration is employed as a management control device during the year for the governmental funds. The appropriated budget is prepared by fund. The legal level of control is the fund level.

Expenditures may not legally exceed appropriations at the fund level. Revisions that alter the total expenditures of any fund must be approved by the Board of Trustees.

Appropriations are based on total funds expected to be available in each budget year, including beginning fund balances and reserves as established by the Board of Trustees. Variances between budget and actual result from the non-expenditure of reserves, nonoccurrence of anticipated events, and normal operating variances.

The Board of Trustees may authorize supplemental appropriations during the year.

Estimates

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

Assets, Liabilities, and Net Position or Fund Balance

Cash and Cash Equivalents

Cash and cash equivalents include cash on hand and in the bank, and short-term investments with original maturities of three months or less from the date of acquisition.

Accounts Receivable

The School considers the district funding and grant funding receivables to be fully collectible. Accordingly, no allowance for uncollectible accounts is required. If amounts become uncollectible based on management's periodic review, they will be written off at the time deemed uncollectible.

Prepaid Expenses

In both the government-wide and fund financial statements, prepaid expenses are recorded as assets in the specific governmental fund in which future benefits will be derived.

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS (CONTINUED)

June 30, 2022

NOTE 2: SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Assets, Liabilities, and Net Position or Fund Balance (Continued)

Capital Assets

For purposes of recording capital assets, the Board has a \$5,000 capitalization threshold.

As of June 30, 2022, the School's capital assets had a net book value of \$1,514,629. Capital assets of the School are depreciated using the straight-line method over the useful lives of the assets; five years for "Vehicles" and "Furniture and Fixtures," three years for "Computers and Software," and ten years for "Leasehold Improvements." The depreciation expense for the year ended June 30, 2022 was \$637,717. Capital assets at June 30, 2022 consisted of the following:

	<u>June 30, 2021</u>	<u>Additions</u>	<u>Dispositions</u>	<u>June 30, 2022</u>
Leasehold Improvements	\$ 171,952	\$ -	\$ -	\$ 171,952
Furniture and Fixtures	398,392		-	398,392
Vehicles	102,021	125,211	-	227,232
Computers and Software	1,186,191	520,562	(352,567)	1,354,186
Capital Assets, at Cost	<u>1,858,556</u>	<u>645,773</u>	<u>(352,567)</u>	<u>2,151,762</u>
Less Accumulated Depreciation	(351,983)	(637,717)	352,567	(637,133)
Capital Assets, Net of Depreciation	<u>\$ 1,506,573</u>	<u>\$ 8,056</u>	<u>\$ -</u>	<u>\$ 1,514,629</u>

Government-Wide Net Position

Government-wide net position is divided into three components:

- Net investment in capital assets - consist of the historical cost of capital assets less accumulated depreciation and less any debt that remains outstanding that was used to finance those assets plus deferred outflows of resources less deferred inflows of resources related to those assets.
- Restricted net position - consist of assets that are restricted by the School's creditors (for example, through debt covenants), by state enabling legislation (through restrictions on shared revenues), by grantors (both federal and state), and by other contributors.
- Unrestricted net position - all other net position is reported in this category.

Fund Statements - Fund Balance

In accordance with Governmental Accounting Standards Board Statement No. 54, fund balance reporting and governmental fund type definitions, the School classified governmental fund balances as follows:

- Nonspendable - amounts that cannot be spent because they are either (1) not in a spendable form or (2) legally or contractually required to remain intact.
- Restricted - the part of fund balance that is restricted to be spent for a specific purpose. The constraints on these amounts must be externally imposed by creditors, grantors, contributors or laws or regulations of other governments; or by enabling legislation. Enabling legislation authorizes the government to assess, levy, change or mandate and includes a legally enforceable requirement on the use of these funds.

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS (CONTINUED)

June 30, 2022

NOTE 2: SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Fund Statements - Fund Balance (Continued)

- Committed - the portion of fund balance that can only be used for specific purposes as a result of formal action by the School's highest level of authority, the school board. Once the item is committed, it cannot be used for any other purpose unless changed by the same procedures used to initially constrain the money, which is the passage of a motion. The School committed \$6,250,000 for future operations use given the potential for district rate reductions, \$2,282,159 for future PSERS contribution expenditures associated with the increasing mandated annual state employer contribution. An additional \$850,643 is committed to implementation of the strategic plan and \$1,017,198 is committed as collateral for the letter-of-credit required under the facility lease. The total committed funds as of June 30, 2022 are \$10,400,000.
- Assigned - reflects the School's intent to use the money for a specific purpose but is not considered restricted or committed. Fund balance may be assigned by the chief executive officer.
- Unassigned - represents the part of spendable fund balance that has not been categorized as restricted, committed or assigned. The general fund is the only fund permitted to have a positive unassigned fund balance.

The School's policy is to first apply restricted resources when an obligation is incurred for purposes for which both restricted and unrestricted net position are available.

NOTE 3: CASH, CASH EQUIVALENTS AND CERTIFICATES OF DEPOSIT

Deposits

Under Section 440.1 of the Public School Code of 1949, as amended, the School is permitted to invest funds consistent with sound business practices in the following types of investments:

- Obligations of (a) the United States of America or any of its agencies or instrumentalities backed by the full faith and credit of the United States of America, (b) the Commonwealth of Pennsylvania or any of its agencies or instrumentalities backed by the full faith and credit of the Commonwealth, or (c) any political subdivision of the Commonwealth of Pennsylvania or any of its agencies or instrumentalities backed by the full faith and credit of the political subdivision.
- Deposits in savings accounts, time deposits, or share accounts of institutions insured by the Federal Deposit Insurance Corporation (FDIC) to the extent that such accounts are so insured and, for any amounts above the insured maximum, provided that approved collateral, as provided by law, is pledged by the depository.

The deposit policy of the School adheres to state statutes and prudent business practice. Deposits of the School as of June 30, 2022 are maintained in demand deposit and time deposit accounts. There were no deposit or investment transactions during the year that were in violation of either the state statutes or the policy of the School. Pursuant to Act 72 of the Pennsylvania State Legislature, a depository must pledge assets to secure state and municipal deposits. The pledged assets must at least be equal to the total amount of such assets required to secure all of the public deposits at the depository and may be on a pooled basis. Additionally, all such pledged assets must be delivered to a legal custodian.

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS (CONTINUED)

June 30, 2022

NOTE 3: CASH, CASH EQUIVALENTS, AND CERTIFICATES OF DEPOSIT (CONTINUED)

Deposits (Continued)

At June 30, 2022, the deposits of the School can be categorized to indicate the level of risk assumed. The School had no investments at June 30, 2022 that required disclosure by risk category. The risk categories are as follows:

Category 1 – insured or collateralized with securities held by the School or by its agent in the School’s name.

Category 2 – collateralized with securities held by the pledging financial institution’s trust department or agent in the School’s name.

Category 3 – collateralized with securities held by the pledging financial institution, or by its trust department or agent but not in the School’s name.

	<u>Category 1</u>	<u>Category 2</u>	<u>Category 3</u>	<u>Bank Balance</u>	<u>Carrying Amount</u>
<u>Deposits</u>					
June 30, 2022	\$ 250,000	\$ -	\$ 12,684,275	\$ 12,934,275	\$ 12,934,260

Included in the financial statements is a “Certificate of Deposit – Limited Use” which is held as collateral for a letter of credit described in Note 11 to the financial statements.

NOTE 4: DISTRICT FUNDING RECEIVABLE

The School invoices the resident school district of each enrolled student based on reimbursement rates established by the Pennsylvania Department of Education. The "District Funding Receivable" on the Statement of Net Position and Balance Sheet - Governmental Funds represents the amounts invoiced to the various school districts, but not collected as of June 30, 2022 reduced by management's estimates of uncollectible amounts based on known circumstances and past experience. The amount of the receivable at year end was \$509,645. An allowance of \$100,131 has been recorded as of June 30, 2022, based on management's estimates of uncollectible amounts.

NOTE 5: GRANTS FUNDING RECEIVABLE

The School has recorded a grant receivable in the amount of \$826,211 to account for the portion of its federal grant awards allocated to the School, but not received as of June 30, 2022.

NOTE 6: AGREEMENTS

The School entered into a three-year agreement with Charter Choices, Inc. effective July 1, 2022. Under this agreement, Charter Choices, Inc. will provide various accounting and compliance reporting services.

The School also has other contracts in place with various vendors for services including back-office information technology (IT), elementary curriculum use, and course website development.

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS (CONTINUED)

June 30, 2022

NOTE 7: DEFINED BENEFIT PENSION PLAN

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, System) 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.

The School follows GASB Statement No. 68, which addresses accounting and financial reporting for pensions that are provided to the employees of state and local governmental employers through pension plans that are administered through trusts and also establish standards for measuring and recognizing liabilities, deferred outflows of resources, deferred inflows of resources, and expenses/expenditures.

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 reporting entities in Pennsylvania. PSERS issues a publicly available financial report that can be obtained at 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, 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.

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS (CONTINUED)

June 30, 2022

NOTE 7: DEFINED BENEFIT PENSION PLAN (CONTINUED)

General Information about the Pension Plan (Continued)

Benefits Provided (Continued)

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.

Member Contributions

The contribution rates based on qualified member compensation for virtually all members are presented below:

Member Contribution Rates				
Membership Class	Continuous Employment Since	Defined Benefit (DB) Contribution Rate	DC Contribution Rate	Total Contribution Rate
T-C	Prior to July 22, 1983	5.25%	N/A	5.25%
				6.25%
T-C	On or after July 22, 1983	6.25%	N/A	6.25%
T-D	Prior to July 22, 1983	6.50%	N/A	6.50%
				7.50%
T-D	On or after July 22, 1983	7.50%	N/A	7.50%
T-E	On or after July 1, 2011	7.50% base rate with shared risk provision	N/A	7.50%
T-F	On or after July 1, 2011	10.30% base rate with shared risk provision	N/A	10.30%
T-G	On or after July 1, 2019	5.50% base rate with shared risk provision	2.75%	8.25%
T-H	On or after July 1, 2019	4.50% base rate with shared risk provision	3.00%	7.50%
DC	On or after July 1, 2019	N/A	7.50%	7.50%

Shared Risk Program Summary

Membership Class	Defined Benefit (DB) Base Rate	Shared Risk Increment	Minimum	Maximum
T-E	7.50%	+/- 0.50%	5.50%	9.50%
T-F	10.30%	+/-0.50%	8.30%	12.30%
T-G	5.50%	+/-0.75%	2.50%	8.50%
T-H	4.50%	+/-0.75%	1.50%	7.50%

Employer Contributions

The School's contractually required contribution rate for fiscal year ended June 30, 2021 was 33.69% 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 \$1,240,349 for the year ended June 30, 2022.

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS (CONTINUED)

June 30, 2022

NOTE 7: DEFINED BENEFIT PENSION PLAN (CONTINUED)

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

At June 30, 2022, the School reported a liability of \$8,170,000 for its proportionate share of the net pension liability. The net pension liability was measured as of June 30, 2021, 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, 2020 to June 30, 2021. 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 .0199 percent, which was an increase of .029 percent from its proportion measured as of June 30, 2020.

For the year ended June 30, 2022, the School recognized pension expense of \$1,220,150. At June 30, 2022, the School reported deferred outflows of resources and deferred inflows of resources related to pensions from the following sources:

	<u>Deferred Outflows of Resources</u>	<u>Deferred Inflows of Resources</u>
Net Difference Between Expected and Actual Investment Earnings	\$ -	\$ 1,300,000
Changes in Assumptions	396,000	-
Changes in Proportions	1,320,000	-
Difference Between Projected and Actual Experience	6,000	107,000
Contributions Subsequent to the Measurement Date	<u>1,240,349</u>	<u>-</u>
	<u>\$ 2,962,349</u>	<u>\$ 1,407,000</u>

The \$1,240,349 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, 2022. Other amounts reported as deferred outflows of resources and deferred inflows of resources related to pensions will be recognized in pension expense as follows:

<u>Year Ending June 30:</u>	
2023	\$ 274,000
2024	179,000
2025	(420,000)

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS (CONTINUED)

June 30, 2022

NOTE 7: DEFINED BENEFIT PENSION PLAN (CONTINUED)

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

Changes in Actuarial Assumptions

The total pension liability as of June 30, 2021 was determined by rolling forward the System's total pension liability at June 30, 2020 to June 30, 2021 using the following actuarial assumptions, applied to all periods included in the measurement:

- Valuation Date - June 30, 2020
- Actuarial cost method - Entry Age Normal -level % of pay
- Investment return - 7.00%, includes inflation at 2.50%
- Salary growth - Effective average of 4.50%, comprised of inflation of 2.50%, and 2.00% for real wage growth and for merit or seniority increases.
- Mortality rates were based on a blend of 50% PubT-2010 and 50% PubG-2010 Retiree Tables for Males and Females, adjusted to reflect PSERS' experience and projected using a modified version of the MP-2020 Improvement Scale
- The discount rate used to measure the Total Pension Liability decreased from 7.25% as of June 30, 2020 to 7.00% as of June 30, 2021.
- Demographic and economic assumptions approved by the Board for use effective with the June 30, 2021 actuarial valuation:
 - Salary growth rate - decreased from 5.00% to 4.50%.
 - Real wage growth and merit or seniority increases (components for salary growth) - decreased from 2.75% and 2.25% to 2.50% and 2.00%, respectively.
 - Mortality rates - Previously 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. Effective with the June 30, 2021 actuarial valuation, mortality rates are based on a blend of 50% PubT-2010 and 50% PubG-2010 Retiree Tables for Males and Females, adjusted to reflect PSERS' experience and projected using a modified version of the MP-2020 Improvement Scale.

The actuarial assumptions used in the June 30, 2021 valuation were based on the results of an actuarial experiences study that was performed for the five-year period through June 30, 2020.

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.

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.

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS (CONTINUED)

June 30, 2022

NOTE 7: DEFINED BENEFIT PENSION PLAN (CONTINUED)

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

Asset Class	Target Allocation	Long-Term Expected Real Rate of Return
Global Public Equity	27.0 %	5.2 %
Private Equity	12.0 %	7.3 %
Fixed Income	35.0 %	1.8 %
Commodities	10.0 %	2.0 %
Absolute Return	8.0 %	3.1 %
Infrastructure/ MLPs	8.0 %	5.1 %
Real Estate	10.0 %	4.7 %
Cash	3.0 %	0.1 %
Leverage	<u>(13.0) %</u>	0.1 %
	<u>100.0 %</u>	

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, 2021.

Discount Rate

The discount rate used to measure the total pension liability was 7.00%. 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 District'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 7.00%, as well as what the net pension liability would be if it were calculated using a discount rate that is 1-percentage point lower (6.00%) or 1-percentage-point higher (8.00%) than the current rate:

	1% Decrease 6.00%	Current Discount Rate 7.00%	1% Increase 8.00%
School's Proportionate Share of Net Pension Liability	\$ 10,724,000	\$ 8,170,000	\$ 6,016,000

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS (CONTINUED)

June 30, 2022

NOTE 7: DEFINED BENEFIT PENSION PLAN (CONTINUED)

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.

NOTE 8: DEFINED CONTRIBUTION RETIREMENT PLAN

As an alternative to the PSERS plan, the School offers a 403(b) plan which covers all new employees. PenServ Plan Services, Inc. is designated as the plan administrator. For participating employees, the School matches 100% or the first 5% of mandatory employee pre-tax deferrals to the plan. The plan's initial effective date was July 1, 2015, but the plan was amended effective March 1, 2017. The amendment stated that employees hired after July 1, 2015 and previously participated in PSERS had a right to choose to participate in this plan or participate in PSERS. Also, employees hired after March 1, 2017 who previously participated in PSERS and have not received a break of greater than 60 days in PSERS contributions prior to being hired at the School had the right to choose between participating in the 403(b) plan or continuing to participate in PSERS. Employees are immediately 100% vested in employer contributions. Employee and employer contributions to the plan were approximately \$350,000 and \$277,000 for the year ended June 30, 2022, respectively.

NOTE 9: OTHER POST EMPLOYMENT BENEFITS (OPEB)

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.

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, 2021, there were no assumed future benefit increases to participating eligible retirees.

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS (CONTINUED)

June 30, 2022

NOTE 9: OTHER POST EMPLOYMENT BENEFITS (OPEB) (CONTINUED)

General Information about the Health Insurance Premium Assistance Program

Premium Assistance Eligibility Criteria

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

- Have 24 ½ 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 in 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.

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, 2021, there were no assumed future benefit increases to participating eligible retirees.

Employer Contributions

The School's 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 \$29,792 for the year ended June 30, 2022.

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS (CONTINUED)

June 30, 2022

NOTE 9: OTHER POST EMPLOYMENT BENEFITS (OPEB) (CONTINUED)

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

At June 30, 2022, the School reported a liability of \$472,000 for its proportionate share of the net OPEB liability. The net OPEB liability was measured as of June 30, 2021, 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, 2020 to June 30, 2021. 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 .0199 percent, which was an increase of .029 percent from its proportion measured as of June 30, 2020.

For the year ended June 30, 2022, the School recognized OPEB expense of \$46,084. At June 30, 2022, the School reported deferred outflows of resources and deferred inflows of resources related to OPEB from the following sources:

	<u>Deferred Outflows of Resources</u>	<u>Deferred Inflows of Resources</u>
Changes In Proportions	\$ 87,000	\$ 2,000
Changes in Assumptions	50,000	6,000
Difference Between Projected and Actual Experience	1,000	-
Net Difference Between Expected and Actual Investment Earnings	4,000	-
Contributions Subsequent to the Measurement Date	29,792	-
	<u>\$ 171,792</u>	<u>\$ 8,000</u>

The \$29,792 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, 2022. Other amounts reported as deferred outflows of resources and deferred inflows of resources related to OPEB will be recognized in OPEB expense as follows:

<u>Year Ending June 30:</u>	
2023	\$ 25,000
2024	29,000
2025	23,000
2026	18,000
2027	15,000

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS (CONTINUED)

June 30, 2022

NOTE 9: OTHER POST EMPLOYMENT BENEFITS (OPEB) (CONTINUED)

Actuarial Assumptions

The Total OPEB Liability as of June 30, 2021, was determined by rolling forward the System's Total OPEB Liability as of June 30, 2020 to June 30, 2021 using the following actuarial assumptions, applied to all periods included in the measurement:

- Actuarial cost method - Entry Age Normal - level % of pay.
- Investment return – 2.18% - S&P 20 Year Municipal Bond Rate.
- Salary growth - Effective average of 4.50%, comprised of inflation of 2.50% and 2.00% 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 a blend of 50% PubT-2010 and 50% PubG-2010 Retiree Tables for Males and Females, adjusted to reflect PSERS' experience and projected using a modified version of the MP-2020 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, 2019 determined the employer contribution rate for fiscal year 2021.
- 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 for Males and Females, adjusted to reflect PSERS' experience projected using a modified version of the MP-2015 Mortality Improvement Scale.

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.

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS (CONTINUED)

June 30, 2022

NOTE 9: OTHER POST EMPLOYMENT BENEFITS (OPEB) (CONTINUED)

Actuarial Assumptions (Continued)

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.

Asset Class	Target Allocation	Long-Term Expected Real Rate of Return
Cash	79.8 %	0.1 %
US Core Fixed Income	17.5 %	0.7 %
Non-US Developed Fixed	2.7 %	(0.3) %
	<u>100.0 %</u>	

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, 2021.

Discount Rate

The discount rate used to measure the Total OPEB Liability was 2.18%. 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 considered a "pay-as-you-go" plan. A discount rate of 2.18%, which represents the S&P 20-year Municipal Bond Rate at June 30, 2021, 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, 2021, 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, 2021, 93,392 retirees were receiving the maximum amount allowed of \$1,200 per year. As of June 30, 2021, 611 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.

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS (CONTINUED)

June 30, 2022

NOTE 9: OTHER POST EMPLOYMENT BENEFITS (OPEB) (CONTINUED)

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

The following presents the System net OPEB liability for June 30, 2021, calculated using current Healthcare cost trends as well as what the System net OPEB liability would be if Healthcare cost trends were 1 percentage point lower or 1 percentage point higher than the current rate:

	<u>1% Decrease</u>	<u>Current Trend Rate</u>	<u>1% Increase</u>
System net OPEB liability	\$ 472,000	\$ 472,000	\$ 472,000

Sensitivity of the School's proportionate share of the net OPEB liability to changes in the discount rate

The following presents the net OPEB liability, calculated using the discount rate of 2.66%, as well as what the net OPEB liability would be if it were calculated using a discount rate that is 1-percentage point lower (1.66%) or 1-percentage-point higher (3.66%) than the current rate:

	<u>1% Decrease 1.66%</u>	<u>Current Discount Rate 2.66%</u>	<u>1% Increase 3.66%</u>
School's Proportionate Share of Net OPEB Liability	\$ 541,000	\$ 472,000	\$ 414,000

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.

NOTE 10: 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. There has been no significant reduction in insurance coverage of the School's policies.

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS (CONTINUED)

June 30, 2022

NOTE 11: COMMITMENTS AND CONTINGENCIES

Grants

The School has received Federal and/or State grants for specific purposes that are subject to review and audit by the grantor agencies. Such audits could lead to a request for reimbursement to grantor agencies for expenditures disallowed under terms of the grant.

Letter of Credit

The School has a \$1,017,198 letter of credit with PNC bank as required in a new facility lease. The letter of credit is secured by School assets along with a certificate of deposit that is shown in the financial statements as "Certificate of Deposit – Limited Use". The lease allows for the reduction in the letter of credit as follows:

<u>As of:</u>	<u>Amount</u>
July 1, 2025	\$ 813,758
July 1, 2026	610,319
July 1, 2027	406,879
July 1, 2028	203,440
July 1, 2029	-

NOTE 12: LEASE OBLIGATIONS

As disclosed in Note 14, the School adopted GASB No. 87, *Leases*. The School entered into a lease for office space located in Sewickley, Pennsylvania. The lease term is one hundred twenty-two months and commenced on June 1, 2020. In June 2021, the School entered into two additional leases in Sewickley, Pennsylvania. The first lease commenced on July 1, 2021 and expires on May 31, 2024 with the option for two additional three-year renewal terms. Monthly payments are \$16,023 and escalate annually. The second lease commenced on January 1, 2022 and expires on May 31, 2027 with the option for two additional three-year renewal terms. Monthly payments are \$6,987 and escalate annually. Rent expense for the year ended June 30, 2022 totaled \$1,176,404. The School has various pieces of equipment under lease through 2026 with monthly payments ranging from \$192 through \$1,095.

Total right-of-use assets under lease for the year ended June 30, 2022 are:

	<u>Cost</u>	<u>Accumulated Amortization</u>
Buildings	\$ 10,410,123	\$ 1,969,713
Equipment	101,891	60,643
 Total	 <u>\$ 10,512,014</u>	 <u>\$ 2,030,356</u>

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS (CONTINUED)

June 30, 2022

NOTE 12: LEASE OBLIGATIONS (CONTINUED)

The future principal and interest payments for the School's leases are as follows:

<u>Year ending June 30:</u>	<u>Principal</u>	<u>Interest</u>
2023	\$ 918,739	\$ 346,812
2024	976,043	309,077
2025	1,032,948	268,941
2026	1,081,047	223,885
2027	1,159,726	181,545
2028-2030	4,804,021	387,783

NOTE 13: LITIGATION

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.

NOTE 14: RECENT ACCOUNTING PRONOUNCEMENTS

In June 2017, the GASB issued Statement No. 87, *Leases*, which is effective for fiscal years beginning after June 15, 2021. This Statement increases the usefulness of governments' financial statements by requiring recognition of certain lease assets and liabilities for leases that previously were classified as operating leases and recognized as inflows of resources or outflows of resources based on the payment provisions of the contract. It establishes a single model for lease accounting based on the foundational principle that leases are financings of the right to use an underlying asset. Under this Statement, lessee is required to recognize a lease liability and an intangible right-to-use lease asset. The School has adopted Statement No. 87 for fiscal year 2022.

As a result of implementing GASB Statement No. 87, the School has restated the beginning net position in the government-wide Statement of Net Position, effectively decreasing net position as of July 1, 2021 by \$163,708.

NOTE 15: SUBSEQUENT EVENTS

The School evaluated its June 30, 2022 financial statements for subsequent events through December 15, 2022, which is the date the financial statements were available to be issued. The School is not aware of any subsequent events which would require recognition or disclosure in the financial statements or notes.

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES,
BUDGET TO ACTUAL - GENERAL FUND (UNAUDITED)

Year ended June 30, 2022

	Budgeted Amounts		Actual	Variance with Final Budget Positive (Negative)
	Original	Final		
Revenues				
Local Revenues	\$ 19,441,665	\$ 19,441,665	\$ 22,254,624	\$ 2,812,959
State Revenues	24,881	24,881	87,580	62,699
Federal Revenues	2,229,901	2,229,901	2,564,615	334,714
Total Revenues	21,696,447	21,696,447	24,906,819	3,210,372
Expenditures				
Instruction	13,025,989	13,025,989	13,439,194	(413,205)
Support Services	8,412,605	8,412,605	7,066,554	1,346,051
Capital Expenses	278,900	278,900	645,773	(366,873)
Debt Service	1,600	1,600	1,203,189	(1,201,589)
Total Expenditures	21,719,094	21,719,094	22,354,710	(635,616)
Net Change in Fund Balances	(22,647)	(22,647)	2,552,109	2,574,756
Fund Balances--July 1, 2021	10,226,594	10,226,594	10,226,594	-
Fund Balances--June 30, 2022	\$ 10,203,947	\$ 10,203,947	\$ 12,778,703	\$ 2,574,756

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

SCHEDULE OF SCHOOL'S PROPORTIONATE SHARE OF THE NET PENSION LIABILITY -

TEACHERS' PENSION PLAN

LAST 10 FISCAL YEARS (UNAUDITED) *

	<u>June 30, 2022</u>	<u>June 30, 2021</u>	<u>June 30, 2020</u>	<u>June 30, 2019</u>	<u>June 30, 2018</u>	<u>June 30, 2017</u>	<u>June 30, 2016</u>	<u>June 30, 2015</u>	<u>June 30, 2014</u>
School's proportion of the net pension liability	0.01990%	0.01709%	0.0163%	0.0153%	0.0140%	0.0143%	0.0158%	0.0140%	0.0110%
School's proportionate share of the net pension liability	\$ 8,170,000	\$ 8,420,000	\$ 7,626,000	\$ 7,345,000	\$ 6,914,000	\$ 7,087,000	\$ 6,843,000	\$ 5,542,000	\$ 4,503,000
School's covered-employee payroll	\$ 2,822,102	\$ 2,384,567	\$ 2,249,477	\$ 2,059,924	\$ 1,867,749	\$ 1,850,478	\$ 1,852,051	\$ 2,029,850	\$ 1,791,587
School's proportionate share of the net pension liability as a percentage of its covered-employee payroll	289.50%	353.10%	339.01%	356.57%	370.18%	382.98%	369.48%	273.03%	251.34%
Plan fiduciary net position as a percentage of the total pension liability	63.67%	54.32%	55.66%	54.00%	51.84%	50.14%	54.36%	57.24%	54.49%

* Until a full 10-year trend is compiled, the School has presented information for those years for which information is available.

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

**SCHEDULE OF SCHOOL'S PROPORTIONATE SHARE OF THE NET OPEB LIABILITY -
TEACHERS' OPEB PLAN
LAST 10 FISCAL YEARS (UNAUDITED) ***

	<u>June 30, 2022</u>	<u>June 30, 2021</u>	<u>June 30, 2020</u>	<u>June 30, 2019</u>
School's proportion of the net OPEB liability	0.0199%	0.0170%	0.0163%	0.0153%
School's proportionate share of the net OPEB liability	\$ 472,000	\$ 367,000	\$ 347,000	\$ 319,000
School's covered-employee payroll	\$ 2,822,102	\$ 2,384,567	\$ 2,249,477	\$ 2,059,924
School's proportionate share of the net OPEB liability as a percentage of its covered-employee payroll	16.73%	15.39%	15.43%	15.49%
Plan fiduciary net position as a percentage of the total OPEB liability	5.30%	5.69%	5.56%	5.56%

* Until a full 10-year trend is compiled, the School has presented information for those years for which information is available.

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

SCHEDULE OF SCHOOL'S CONTRIBUTIONS -
TEACHERS' OPEB PLAN
LAST 10 FISCAL YEARS (UNAUDITED) *

	<u>June 30, 2022</u>	<u>June 30, 2021</u>	<u>June 30, 2020</u>	<u>June 30, 2019</u>
School's contractually required contribution rate	0.82%	0.84%	0.83%	0.83%
School's contributions recognized by the plan	\$ 23,084	\$ 20,043	\$ 18,670	\$ 17,097
Difference between employer contributions and proportionate share of total contributions	\$ 259	\$ 259	\$ 379	\$ 402
School's covered-employee payroll	\$ 2,822,102	\$ 2,384,567	\$ 2,249,477	\$ 2,059,924
School's proportionate contributions as a percentage of its covered-employee payroll	0.82%	0.84%	0.83%	0.83%

* Until a full 10-year trend is compiled, the School has presented information for those years for which information is available.



December 15, 2022

To the Board of Trustees
Pennsylvania Distance Learning Charter School
Sewickley, Pennsylvania

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

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 of the General Fund of Pennsylvania Distance Learning Charter School (the School), as of and for the year ended June 30, 2022, and the related notes to the financial statements, which collectively comprise the School's basic financial statements, and have issued our report thereon dated December 15, 2022.

Report on Internal Control over Financial Reporting

In planning and performing our audit of the financial statements, we considered the School's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our 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 were not identified.

Report on Compliance and Other Matters

As part of obtaining reasonable assurance about whether the School's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the 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*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity'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 entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Hill, Barth & King LLC

Certified Public Accountants



December 15, 2022

To the Board of Trustees
Pennsylvania Distance Learning Charter School
Sewickley, Pennsylvania

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

Report on Compliance for Each Major Federal Program

Opinion on Each Major Federal Program

We have audited Pennsylvania Distance Learning Charter School's compliance with the types of compliance requirements identified as subject to audit in the *OMB Compliance Supplement* that could have a direct and material effect on Pennsylvania Distance Learning Charter School's major federal programs for the year ended June 30, 2022. Pennsylvania Distance Learning Charter School's major federal programs are identified in the summary of auditor's results section of the accompanying schedule of findings and questioned costs.

In our opinion, Pennsylvania Distance Learning Charter 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, 2022.

Basis for Opinion on Each Major Federal Program

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). Our responsibilities under those standards and the Uniform Guidance are further described in the Auditor's Responsibilities for the Audit of Compliance section of our report.

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

Responsibilities of Management for Compliance

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

Auditor's Responsibilities for the Audit of Compliance

Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on Pennsylvania Distance Learning Charter School's compliance based on our audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards, *Government Auditing Standards*, and the Uniform Guidance will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about Pennsylvania Distance Learning Charter School's compliance with the requirements of each major federal program as a whole.

In performing an audit in accordance with generally accepted auditing standards, *Government Auditing Standards*, and the Uniform Guidance, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding Pennsylvania Distance Learning Charter School's compliance with the compliance requirements referred to above and performing such other procedures as we considered necessary in the circumstances.
- Obtain an understanding of Pennsylvania Distance Learning Charter School's internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of Pennsylvania Distance Learning Charter School's internal control over compliance. Accordingly, no such opinion is expressed.

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

Report on Internal Control Over Compliance

A *deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance 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 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 Auditor's Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance. Given these limitations, during our audit we did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses, as defined above. However, material weaknesses or significant deficiencies in internal control over compliance may exist that were not identified.

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

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

Hill, Barth & King LLC
Certified Public Accountants

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

NOTES TO SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS

Year ended June 30, 2022

Federal Grantor Pass-Through Grantor Program Title	Federal Assistance Listing Number	Pass-Through Grantor's Number	Grant Amount	Federal Expenditures
U.S. Department of Education				
Pass-Through Pennsylvania Department of Education				
Title I - Improving Basic Programs	84.010	013-181029	\$ 484,577	\$ 20,408
Title I - Improving Basic Programs	84.010	013-181029	651,129	651,129
Title I - Improving Basic Programs	84.010	042 201044	75,000	75,000
Total Title I Expenditures				<u>746,537</u>
Title II - Supporting Effective Instruction State Grants	84.367	020-181029	49,831	2,703
Title II - Supporting Effective Instruction State Grants	84.367	020-181029	57,526	57,526
Total Title II Expenditures				<u>60,229</u>
Title IV, Part A - Student Support and Academic Enrichment Program	84.424	144-181029	19,743	938
Title IV, Part A - Student Support and Academic Enrichment Program	84.424	144-181030	36,441	36,441
Total Title IV, Part A Expenditures				<u>37,379</u>
Pass-Through Pennsylvania Department of Education Allegheny IU				
Title III - English Language Acquisition State Grants	84.365	010-210603	2,456	2,456
Total Title III Expenditures				<u>2,456</u>
Pass-Through COVID-19 Relief Funding				
Elementary and Secondary School Emergency Relief II Fund - (ESSER II)	84.425D	200-211044	1,789,392	795,869
American Rescue Plan - Elementary and Secondary School Emergency Relief	84.425U	200-211044	3,616,848	343,166
American Rescue Plan - ARP ESSER After School	84.425U	252-201044	40,187	40,187
American Rescue Plan - ARP ESSER Learning Loss	84.425U	252-201044	200,937	117,174
American Rescue Plan - ARP ESSER Summer School	84.425U	252-201044	40,187	600
Total ARP ESSER Expenditures				<u>1,296,996</u>
Pass-Through Allegheny IU				
IDEA Part B - Special Education Grants to States	84.027	N/A	338,386	338,386
COVID-19, ARP IDEA	84.027	N/A	82,632	82,632
Total Special Education Grants to States Expenditures				<u>421,018</u>
Total U.S. Department of Education				<u>2,564,615</u>
 Total Expenditures of Federal Awards		 Total		 <u>\$ 2,564,615</u>

See accompanying notes to schedule of expenditures of federal awards

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

NOTES TO SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS

Year ended June 30, 2022

NOTE A: BASIS OF PRESENTATION

The accompanying schedule of expenditures of federal awards (the Schedule) includes the federal grant activity of Pennsylvania Distance Learning Charter School under programs of the federal government for the year ended June 30, 2022. 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 Pennsylvania Distance Learning Charter School, it is not intended to and does not present the statement of net position, statement of activities, or cash flows of Pennsylvania Distance Learning Charter School.

NOTE B: SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Expenditures reported on the Schedule are reported on the 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. Pass-through entity identifying numbers are presented where available. No funds were provided to sub-recipients.

NOTE C: INDIRECT COST RATE

Pennsylvania Distance Learning Charter School has elected not to use the 10% de minimis indirect cost rate allowed under the Uniform Guidance.

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

SCHEDULE OF FINDINGS AND QUESTIONED COSTS

Year ended June 30, 2022

SECTION 1 – SUMMARY OF AUDITOR’S RESULTS

Type of Financial Statement Opinion	Unmodified
Were there any material weaknesses in internal control reported at the financial statement level (GAGAS)?	No
Were there any other significant deficiencies in internal control reported at the financial statement level (GAGAS)?	No
Was there any reported material noncompliance at the financial statement level (GAGAS)?	No
Were there any material weaknesses in internal control reported for major federal programs?	No
Were there any other significant deficiencies in internal control reported for major federal programs?	No
Type of Major Programs’ Compliance Opinion	Unmodified
Are there reportable findings under the Uniform Guidance?	No
Major Programs (list):	Education Stabilization Fund Under The Coronavirus Aid, Relief and Economic Security Act AL No. 84.425
Dollar Threshold: Type A/B Programs	Type A: > \$750,000 Type B: all others
Low Risk Auditee?	No

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

SCHEDULE OF FINDINGS AND QUESTIONED COSTS (CONTINUED)

Year ended June 30, 2022

**SECTION 2 – FINDINGS RELATED TO THE FINANCIAL STATEMENTS
REQUIRED TO BE REPORTED IN ACCORDANCE WITH GAGAS**

None

**SECTION 3 – FINDINGS AND QUESTIONED COSTS
FOR MAJOR FEDERAL AWARD PROGRAMS**

None

PENNSYLVANIA DISTANCE LEARNING CHARTER SCHOOL

SCHEDULE OF PRIOR AUDIT FINDINGS AND QUESTIONED COSTS

Year ended June 30, 2022

None



pennsylvania
DEPARTMENT OF EDUCATION

January 15, 2018

Ms. Patricia Rossetti
Chief Executive Officer
Pennsylvania Distance Learning CS
2100 Corporate Drive
Suite 500
Wexford, Pa 15090

Dear Ms. Rossetti:

Enclosed is the Report of Findings presenting results of the cyclical monitoring which was conducted by the Bureau of Special Education (BSE) in the Pennsylvania Distance Learning CS the week of December 4, 2017.

The Executive Summary is arranged in two parts and includes an Appendix. PART I presents the Summary of Findings including an explanation of the review process and general findings. PART II describes the corrective action process. A description identifying findings of noncompliance, corrective action required, improvement planning needed, and results of interviews of staff and parents can be found in the Appendix. The charter school must complete corrective action within the calendar days as outlined in the Charter School Corrective Action Verification/Compliance and Improvement Plan developed with the BSE Adviser. Follow-up onsite reviews verifying the charter school's completion of corrective action will be conducted by the BSE. The BSE Adviser will contact the charter school to schedule the initial visit within 60 days of issuance of the monitoring report.

34 CFR 300.600 mandates the BSE to carry out monitoring activities and implementation of any necessary corrective action. Legal compliance is the basis on which high quality programs are built. It is policy of the Department of Education to promote and ensure compliance with special education statutes and regulations through an array of activities such as a coordinated program of plan review, compliance monitoring, technical assistance, and funding decisions. However, if the Department does not succeed in obtaining prompt compliance through activities such as monitoring, then more rigorous steps can be taken to make sure compliance is resolved. These include:

- Disapproval or rescinded approval of the local special education plan
- Deferral of the disbursement of state or federal funds pending resolution of the issue
- Reduction of the amount of funds (for example, by the amount of money it takes to provide an appropriate education to a particular child or children) if a charter school is unwilling to provide appropriate services

None of these steps are desirable and none should be necessary if each charter school is familiar with and attentive to the rules governing special education.

If you have any questions about this report, contact Cortney Verner, the Chairperson of the compliance monitoring team.

Please convey my thanks to all staff who participated in the review. Their time and assistance is appreciated.

Sincerely,

Ann Hinkson-Herrmann
Director

Attachments: Executive Summary
Appendix: Detailed Report of Findings, Including Corrective Actions Required

CC: Chairperson
Jill Deitrich
CS Monitoring File



Executive Summary BSE Compliance Monitoring Review of the Pennsylvania Distance Learning CS

PART I SUMMARY OF FINDINGS

A. Review Process

Prior to the Bureau's monitoring the week of December 4, 2017, the Pennsylvania Distance Learning 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.

FSA	In Compliance	Out of Compliance
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	0	1
Provision of Related Service Including Psychological Counseling	1	0
Parent Training	1	0
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)	1	1
Disproportionate Representation that is the Result of Inappropriate Identification		

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

*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 Distance Learning CS is as follows:

Sections of the FILE REVIEW	In Compliance	Out of Compliance	NA
Essential Student Documents Are Present and Were Prepared Within Timelines	88	0	72
Evaluation/Reevaluation: Process and Content	239	0	541
Individualized Education Program: Process and Content	518	14	268
Procedural Safeguards: Process and Content	119	0	1
TOTALS	964	14	882

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.

	# Yes Responses	# No Responses	# of Other Responses
Program Implementation: General Ed Teacher Interviews	247	8	83
Program Implementation: Special Ed Teacher Interviews	329	3	118
Program Implementation: Parent Interviews	214	22	113
TOTALS	790	33	314

4. CLASSROOM OBSERVATIONS

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

	# Yes Responses	# No Responses	# of Other Responses
Classroom Observations	0	0	0

5. EDUCATIONAL BENEFIT REVIEW

	In Compliance	Out of Compliance
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 Distance Learning CS

Chief Executive Officer: Ms. Patricia Rossetti

Special Education Director/Coordinator: _____

BSE Special Education Adviser: Cortney Verner

Date of Report: January 15, 2018

Date Final Report Sent to LEA: January 15, 2018

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: _____

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
						Topical Area 1: Policies, Practices, and Procedures			
Y						1. FSA-ASSISTIVE TECHNOLOGY AND SERVICES Standard: The Local Education Agency (LEA) observed the requirement that the provision of assistive technology is reflected in the student's IEP			
Y						1A. FSA-HEARING AIDS Standard: 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. FSA-POSITIVE BEHAVIOR SUPPORT Standard: LEA complies with the positive behavior support policy requirements.			
Y						3. FSA-CHILD FIND Standard: 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. FSA-CONFIDENTIALITY Standard The LEA is in compliance with confidentiality requirements.			
		X				5. FSA-DISPUTE RESOLUTION (DUE PROCESS HEARING DECISION IMPLEMENTATION) Standard: The LEA uses dispute resolution processes for program improvement.			
		X				8. FSA-PROCEDURAL REQUIREMENTS FOR SUSPENSION Standard: The LEA adheres to procedural requirements in suspending students with disabilities.			
Y						10. FSA-INDEPENDENT EDUCATIONAL EVALUATION Standard: The LEA documents a procedure for responding to requests made by parents for an independent educational evaluation at public expense.			
Y						11A. FSA-LEAST RESTRICTIVE ENVIRONMENT Standard: The LEA's continuum of special education services supports the availability of LRE under 34 CFR Part 300.			
	N					12. FSA-EXTENDED SCHOOL YEAR SERVICES			
Y						13. FSA-RELATED SERVICE INCLUDING PSYCHOLOGICAL COUNSELING			
Y						15. FSA-PARENT TRAINING 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.			
						INTERVIEW RESULTS (Parent)			
						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
					5 2 1 1 0 0	Always Sometimes Rarely Never Don't Know Does not Apply			
					5 2 1 1 0 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. FSA-SURROGATE PARENTS (STUDENTS REQUIRING) Standard: The LEA identifies eligible students in need of surrogate parents and recruits, selects, trains, and assigns in a timely manner.			
Y						19. FSA-PERSONNEL TRAINING Standard: 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.			
						INTERVIEW RESULTS (General & Special Education Teacher)			
10	0	0				GE 88. Do you receive training regarding how to differentiate instruction and modify the curriculum in your classroom?			
10	0	0				GE 89. Do you receive training regarding how to provide positive behavior supports for students with negative behaviors?			
10	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?			
10	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
0	0	10				GE 94. If a student has AT included in his/her current IEP, have you received training in AT, and accessing AT resources?			
10	0	0				SE 124. Do you collaborate with general education teachers and administrators to recommend training needs for personnel within the LEA?			
		X				20. FSA-INTENSIVE INTERAGENCY APPROACH Standard: 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. FSA-SUMMARY OF ACADEMIC AND FUNCTIONAL PERFORMANCE/PROCEDURAL SAFEGUARD REQUIREMENTS FOR GRADUATION Standard: 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. TRANSITION REQUIREMENTS Standard: 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.		
						Topical Area 2: Delivery of Service			
	N					17. FSA-PUBLIC SCHOOL ENROLLMENT Standard: The LEA's percentage of children with disabilities served in special education is comparable to state data.	The LEA will develop an improvement plan to address significant discrepancy in total number of students identified as special education compared to the state average, more specifically, students identified as Other Health Impaired (OHI).		
Y						17B. FSA-PUBLIC SCHOOL ENROLLMENT Standard: 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. FSA-DISPROPORTIONATE REPRESENTATION THAT IS THE RESULT OF INAPPROPRIATE IDENTIFICATION Standard: LEA does not demonstrate disproportionate representation of racial/ethnic groups receiving special education or by disability group.			
Y						23. FSA-EDUCATIONAL BENEFIT REVIEW Standard: The IEP meets procedural compliance and is reasonably calculated to enable the child to advance appropriately toward attaining their annual goals.			
						CLASSROOM OBSERVATIONS			
0	0	0		0		CO 1. Is the instruction provided to the student individualized as required by his/her IEP?			
0	0	0		0		CO 2. Is the instruction being provided in accordance with the goals in the student's IEP?			
0	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	0		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	0		0		CO 5. If the student is in a regular education setting, is the student appropriately integrated (physically) in the class?			
0	0	0		0		CO 6. If the student's IEP contains supplementary aids and/or services, are they being delivered in the classroom setting as required?			
0	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?			
						INTERVIEW RESULTS (Parent, General & Special Education Teacher)			
						P 55. My child does classroom work in a regular classroom with students without disabilities.			
					9	Always			
					0	Sometimes			
					0	Rarely			
					0	Never			
					0	Don't Know			
					0	Does not Apply			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
					8 0 0 0 1 0	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			
					1 4 1 2 0 1	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			
					5 3 0 0 1 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			
10	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?			
10	0	0				GE 71. Do you adapt and modify the general education curriculum based on the student's current IEP?			
10	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?			
10	0	0				GE 73. Are you and the special education personnel working collaboratively to implement this student's program?			
10	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?			
10	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
10	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 the ability to have access to peer interaction. Loves to participate and keeps the pace of the curriculum with peers. Peer relations, curriculum and teacher interaction are made readily available. Has exposure to general education expectations and peer interactions. Increased opportunities for peer interaction. Becomes more engaged and increased responses to social questions with general education peers. Positive exposure to peers. The content being taught is assisting the current individualized education plan. Demonstrates success and progress with on grade-level content. Has an opportunity to be with peers, has high expectations and able to follow grade level content.			
0	0	10				GE 80c. If no, what does this student need that he/she is not receiving in your class?			
10	0	0				GE 85. Do you have sufficient time to collaborate with the special education teacher in order to meet this student's needs?			
10	0	0				GE 85a. Have you received sufficient training, technical assistance and other support to teach this student?			
0	0	10				GE 85b. If no, what training or support would assist you?			
10	0	0				GE 93. Do special education personnel work directly with you to help you reduce negative student behaviors?			
10	0	0				SE 95. Is this student participating in the general education class and curriculum with students without disabilities to the maximum extent possible?			
8	0	2				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?			
5	3	2				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?			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
						Requires special instruction in identified skill areas. Additional supports are needed to help in identified academic areas. Need for additional special education services based on student performance/need. Functional performance and demonstrated academic needs indicated the need for more specialized instruction. Needs opportunity to reinforce skills related to the IEP goals.			
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? IEP team decision based upon needs. Time was determined based upon skill needs and current schedule. The time was determined by the needs to be addressed successfully. IEP team decision. The time was based on needs to master certain concepts/skills.			
8	0	2				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?			
10	0	0				SE 96. Has the student been given the opportunity to participate in non-academic and extracurricular activities with children without disabilities?			
10	0	0				SE 97. Have necessary supports been offered and/or provided to enable that participation?			
8	0	2				SE 99. Are you and related services personnel working together toward meeting the measurable annual goals for this student?			
10	0	0				SE 100. Are you and general education personnel working together toward meeting the measurable annual goals for this student?			
10	0	0				SE 115. Did the IEP team have available information regarding use of the Supplementary Aids and Services ToolKit?			
10	0	0				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?			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
						Topical Area 3: Performance Indicators			
		X				5A. FSA-EFFECTIVE USE OF DISPUTE RESOLUTION Standard: The LEA uses dispute resolution processes for program improvement.			
Y						6. FSA-GRADUATION RATES (SPP) Standard: The graduation rate of the LEA's students with disabilities is comparable to the state graduation rate.			
Y						7. FSA-DROPOUT RATES (SPP) Standard: The dropout rate of the LEA's students with disabilities is comparable to the state dropout rate.			
		X				8A. FSA-SUSPENSION RATES Standard: 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. FSA-LEAST RESTRICTIVE ENVIRONMENT (SPP) Standard: Students with disabilities are provided for in the least restrictive environment			
Y						16. FSA-PARTICIPATION IN PSSA AND PASA (SPP) Standard: The LEA's population of students who participate in state assessment is comparable with the state data.			
Y						16A. FSA-LOCAL ASSESSMENT			
						Topical Area 4: Evaluation and Reevaluation Process and Content			
						CONSENT AND WAIVER REQUIREMENTS FOR EVALUATION/REEVALUATION			
						PERMISSION TO EVALUATE (File Reviews)			
0	0	10				FR 153. PTE-Consent Form is present in the student file			
0	0	10				FR 154. Demographic data			
0	0	10				FR 155. Reason(s) for referral for evaluation			
0	0	10				FR 156. Proposed types of tests and assessments			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
0	0	10				FR 157. Contact person's name and contact information			
0	0	10				FR 158. Parent signature or documentation of reasonable efforts to obtain consent			
0	0	10				FR 159. Parent has selected a consent option			
						PERMISSION TO REEVALUATE (File Reviews)			
8	0	2				FR 194. PTRE-Consent Form is present in the student file			
8	0	2				FR 195. Demographic data			
8	0	2				FR 196. Reason for reevaluation			
8	0	2				FR 197. Types of assessment tools, tests and procedures to be used			
8	0	2				FR 198. Contact person's name and contact information			
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			
						AGREEMENT TO WAIVE REEVALUATION (File Reviews)			
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 MR 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			
						EVALUATION REPORT (INITIAL) (File Reviews)			
0	0	10				FR 160. ER is present in the student file			
0	0	10				FR 161. Evaluation was completed within timelines			
0	0	10				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)			
0	0	10				FR 163. Demographic data			
0	0	10				FR 164. Date report was provided to parent			
0	0	10				FR 165. Reason(s) for referral			
0	0	10				FR 166. Reason(s) for referral reflect the reason(s) listed on the PTE-Consent Form			
0	0	10				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	0	10				FR 168. Teacher observations and observations by related service providers, when appropriate			
0	0	10				FR 169. Recommendations by teachers			
0	0	10				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			
0	0	10				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)			
0	0	10				FR 173. Lack of appropriate instruction in reading			
0	0	10				FR 174. Lack of appropriate instruction in math			
0	0	10				FR 175. Limited English proficiency			
0	0	10				FR 176. Present levels of academic achievement			
0	0	10				FR 177. Present levels of functional performance			
0	0	10				FR 178. Behavioral information			
0	0	10				FR 179. Conclusions			
0	0	10				FR 180. Disability Category			
0	0	10				FR 181. Recommendations for consideration by the IEP team			
0	0	10				FR 182. Evaluation Team Participants documented			
0	0	10				FR 183. For students evaluated for SLD documentation of Agree/Disagree			
0	0	10				FR 184. Documentation that the student does not achieve adequately for age, etc.			
0	0	10				FR 185. Indication of process(es) used to determine eligibility			
0	0	10				FR 186. Instructional strategies used and student-centered data collected			
0	0	10				FR 187. Educationally relevant medical findings, if any			
0	0	10				FR 188. Effects of the student's environment, culture, or economic background			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
0	0	10				FR 189. Data demonstrating that regular education instruction was delivered by qualified personnel, including the ESL program, if applicable			
0	0	10				FR 190. Data based documentation of repeated assessments of achievement at reasonable intervals, which was provided to parents			
0	0	10				FR 191. Observation in the student's learning environment			
0	0	10				FR 192. Other data if needed			
0	0	10				FR 193. Statement for all 6 items indicated to support conclusions of the evaluation team			
						REEVALUATION REPORT (File Reviews)			
10	0	0				FR 207. RR is present in the student file			
10	0	0				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 MR student or any student placed in an Approved Private School) of date of ER, prior RR, or Agreement to Waive RR)			
10	0	0				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)			
10	0	0				FR 210. Demographic data			
10	0	0				FR 211. Date IEP team reviewed existing evaluation data			
10	0	0				FR 212. Physical condition, social, or cultural background and adaptive behavior relevant to the student's need for special education			
10	0	0				FR 213. Evaluations and information provided by the parent (or documentation of LEA's attempts to obtain parent input)			
10	0	0				FR 214. Aptitude and achievement tests			
10	0	0				FR 215. Current classroom based assessments and local and/or state assessments			
10	0	0				FR 216. Observations by teacher(s) and related service provider(s) when appropriate			
10	0	0				FR 217. Teacher recommendations			
10	0	0				FR 218. Lack of appropriate instruction in reading			
10	0	0				FR 219. Lack of appropriate instruction in math			
10	0	0				FR 220. Limited English proficiency			
10	0	0				FR 221. Conclusion regarding need for additional data is indicated			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
2	0	8				FR 222. Reasons additional data are not needed are included			
10	0	0				FR 223. Determination whether the child has a disability and requires special education			
10	0	0				FR 224. Disability category(ies)			
10	0	0				FR 225. Summary of findings includes student's educational strengths and needs			
10	0	0				FR 226. Summary of findings includes present levels of academic achievement and related developmental needs, including transition needs as appropriate			
10	0	0				FR 227. Summary of findings includes recommendations for consideration by the IEP team regarding additions or modifications to the student's programs			
8	0	2				FR 228. Interpretation of additional data			
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			
10	0	0				FR 239. Documentation of Evaluation Team Participants			
1	0	9				FR 240. Documentation that team members Agree/Disagree			
						INTERVIEW RESULTS (Parent & Special Education Teacher)			
9	0	0	0			P 24. Have you been asked to provide information for your child's evaluation/reevaluation?			
9	0	0	0			P 25. Were you given the opportunity to provide this information in writing or in another way that worked for you?			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
9	0	0	0			P 26. Was the information you provided to the school for your child's evaluation considered in your child's Evaluation Report?			
1	0	8	0			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?			
1	8	0	0			P 51. Have you requested an Independent Educational Evaluation (IEE) for your child to be paid for by the school?			
0	0	9	0			P 52. If you have obtained an IEE for your child, were the results of that evaluation considered by the team?			
0	0	9	0			P 53. Were the results of the IEE included in the school's Evaluation Report for your child?			
3	0	7				SE 119. If this student is not making progress, has he/she been reevaluated and/or has the IEP been reviewed?			
						Topical Area 5: IEP Process and Content			
						INVITATION TO PARTICIPATE IN IEP TEAM OR OTHER MEETING (File Reviews)			
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			
7	0	3				FR 245. Transition planning and services – Invitation to parents is checked (age 14, younger if determined appropriate)			
3	1	6			25%	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			
6	1	3			14%	FR 247. Transition planning and services – Invitation to student is checked (age 14, or younger if determined appropriate)			
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			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
						PARENT CONSENT TO EXCUSE MEMBERS FROM ATTENDING IEP TEAM MEETING (File Reviews)			
0	0	10				FR 251. Parent Consent to Excuse Members from Attending the IEP Team Meeting is present in the student file			
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			
					0 0 0	FR 256. The team members excused: a. General Education Teacher b. Special Education Teacher c. Local Education Agency Representative			
						IEP CONTENT (File Reviews)			
10	0	0				FR 257. IEP is present in the student file			
10	0	0				FR 258. IEP was completed within timelines			
10	0	0				FR 259. Demographic data			
10	0	0				FR 260. IEP implementation date			
10	0	0				FR 261. Anticipated duration of services and programs			
5	0	5				FR 262. If appropriate, LEA and parent agreement to make changes to IEP without convening an IEP meeting			
						DOCUMENTATION OF IEP TEAM PARTICIPATION (File Reviews)			
10	0	0				FR 263. Parents			
7	0	3				FR 264. Student			
10	0	0				FR 265. General Education Teacher			
10	0	0				FR 266. Special Education Teacher			
9	0	1				FR 267. Local Education Agency Representative			
2	0	8				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			
10	0	0				FR 273. Copy of Procedural Safeguards Notice was given to parent during the school year			
						SPECIAL CONSIDERATIONS (File Reviews)			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
1	0	9				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			
0	0	10				FR 275. If the student is deaf or hard of hearing, a communication plan			
3	0	7				FR 276. If the student has communication needs, needs must be addressed in the IEP			
0	0	10				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			
2	0	8				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			
0	0	10				FR 280. If the student has other special considerations, these are addressed in the IEP			
						PRESENT LEVELS OF ACADEMIC ACHIEVEMENT AND FUNCTIONAL PERFORMANCE (File Reviews)			
10	0	0				FR 281. Student's present levels of academic achievement			
10	0	0				FR 282. Student's present levels of functional performance			
6	1	3			14%	FR 283. Present levels related to current postsecondary transition goals (if student is 14, or younger if determined by IEP team)			
10	0	0				FR 284. Parental concerns for enhancing the education of the student (if provided by parent to the LEA)			
10	0	0				FR 285. How the student's disability affects involvement and progress in the general education curriculum			
10	0	0				FR 286. Strengths			
10	0	0				FR 287. Academic, developmental, and functional needs related to student's disability			
						TRANSITION SERVICES (File Reviews)			
5	2	3			29%	FR 289. Evidence that the measurable postsecondary goal(s) were based on age appropriate transition assessment			
5	2	3			29%	FR 290. An appropriate measurable postsecondary goal or goals that covers education or training, employment, and, as needed, independent living			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
6	1	3			14%	FR 291. Evidence that the postsecondary goal or goals that covers education or training, employment, and, as needed, independent living are updated annually			
6	1	3			14%	FR 292. Location, Frequency, Projected Beginning Date, Anticipated Duration, and Person(s)/Agency Responsible for Activity/Service			
6	1	3			14%	FR 292a. Transition services include courses of study that will reasonably enable the student to meet his/her postsecondary goal(s)			
5	2	3			29%	FR 292b. Transition services in the IEP that will reasonably enable the student to meet his/her postsecondary goal(s)			
6	1	3			14%	FR 292c. Annual goals are related to the student's transition services			
						PARTICIPATION IN STATE AND LOCAL ASSESSMENTS (File Review)			
10	0	0				FR 293. Documentation of IEP team decision regarding participation in statewide assessments (PSSA/Keystone Exams, ACCESS for ELLS, Alternate ACCESS for ELLS or PASA)			
6	0	4				FR 294. If the student will participate in the PSSA, documentation of IEP team decision regarding participation with or without accommodations			
3	0	7				FR 295. If the student will participate in the PASA, an explanation of why the student cannot participate in the PSSA/Keystone Exams			
3	0	7				FR 296. If the student will participate in the PASA, explanation of why PASA is appropriate			
3	0	7				FR 297. If the student will participate in the PASA, how student's performance will be documented (videotape or written narrative)			
10	0	0				FR 298. Indication of IEP team decision regarding participation in local assessments (local or alternate local)			
7	0	3				FR 299. If the student will participate in local assessments, indication of IEP team decision regarding participation with or without accommodations			
2	0	8				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			
2	0	8				FR 301. If the student will participate in an alternate local assessment, explanation of why the alternate assessment is appropriate			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
						ANNUAL GOALS AND OBJECTIVES (INCLUDING ACADEMIC AND FUNCTIONAL GOALS) (File Reviews)			
9	0	1				FR 302. Measurable Annual Goals			
9	0	1				FR 303. Description of how student progress toward meeting goals will be measured			
10	0	0				FR 304. Description of when periodic reports on progress will be provided to parents			
10	0	0				FR 305. Documentation of progress reporting on Annual Goals			
3	0	7				FR 306. Short Term Objectives			
						SPECIAL EDUCATION/RELATED SERVICES/SUPPLEMENTARY AIDS AND SERVICES/PROGRAMS MODIFICATIONS (File Reviews)			
10	0	0				FR 307. Program Modifications and Specially-Designed Instruction			
9	0	1				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	1	0			10%	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	0	3				FR 311. If Related Services are included on the IEP, the location, frequency, projected beginning date and anticipated duration of services			
8	0	2				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			
9	0	1				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			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
9	0	1				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			
10	0	0				FR 316. A conclusion regarding student eligibility for ESY			
10	0	0				FR 317. Information or data reviewed by the IEP team to support the ESY eligibility determination			
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			
6	0	4				FR 319. Where ESY was determined to be appropriate, ESY service to be provided, location, frequency, projected beginning date and anticipated duration of services			
						EDUCATIONAL PLACEMENT (File Reviews)			
10	0	0				FR 320. Explanation of the extent, if any, to which the student will not participate with students without disabilities in the regular education class			
10	0	0				FR 321. Explanation of the extent, if any, to which the student will not participate with students without disabilities in the general education curriculum			
10	0	0				FR 322. Type of support, by amount (itinerant, supplemental, full-time)			
10	0	0				FR 323. Type of special education supports, e.g. autistic support, emotional support, learning support, etc.			
10	0	0				FR 324. Location of student's program (name of LEA where the IEP will be implemented)			
10	0	0				FR 325. Location of student's program (name of School Building where the IEP will be implemented)			
0	0	10				FR 326. If child will not be attending his/her neighborhood school, reason why not			
						PENNDATA REPORTING FOR EDUCATIONAL ENVIRONMENT (File Reviews)			
10	0	0				FR 327. Completed Section A or Section B			
						IEP DEVELOPMENT			
						INTERVIEW RESULTS (Parent & General Education Teacher)			
9	0	0	0			P 28. Were you invited to participate in your child's most recent IEP team meeting?			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
9	0	0	0			P 29. Did you participate in developing the current IEP for your child?			
9	0	0	0			P 30. Was the meeting held at a time and location that was convenient for you?			
0	0	9	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?			
9	0	0	0			P 32. Was the input you provided considered in the development of your child's current IEP?			
7	2	0	0			P 32a. Have you received sufficient training, technical assistance and other support to participate as an IEP team member?			
0	0	7	0			P 32b. If no, what training or support would assist you? Anything would be helpful. More information/training on how to support children with academic challenges.			
9	0	0	0			P 33. Were the services you requested for your child considered by the IEP team in the development of your child's current IEP?			
9	0	0	0			P 35. Was the current IEP developed at the IEP meeting?			
3	1	3	2			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?			
9	0	0	0			P 37. Were the special education teacher, the general education teacher and the school representative at the IEP meeting?			
0	0	9	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	9	0			P 39. Was written input from the excused IEP team member(s) available to you before the meeting?			
		8	1			P 65. If you did not participate in your child's IEP meeting, what kept you from participating?			
6	0	4				GE 74. Did you attend the most recent IEP meeting for this student or have the opportunity to provide input?			
4	3	3				GE 75. Did you recommend any needed supports to implement the current IEP for this student?			
4	0	6				GE 76. Were those recommendations considered by the IEP team?			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
10	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?			
10	0	0				GE 87. Do you provide progress monitoring data as part of the IEP development process?			
						IEP CONTENT			
						INTERVIEW RESULTS (Parent, General & Special Education Teacher)			
9	0	0	0			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?			
9	0	0	0			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.			
10	0	0				GE 81. Are this student's goals based on the PA Standards/PA Common Core or, if appropriate, alternate standards?			
10	0	0				GE 82. Is the specially designed instruction in this student's current IEP appropriate to meet his/her educational needs?			
10	0	0				GE 83. Is the current IEP appropriate to meet this student's educational needs?			
10	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?			
10	0	0				SE 102. Is the specially-designed instruction in the current IEP appropriate to meet this student's educational needs?			
10	0	0				SE 103. Are the student's annual goals based on the PA Standards/PA Common Core or, if appropriate, alternate standards?			
10	0	0				SE 104. If appropriate, are the student's annual goals based on functional performance?			
9	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?			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
8	0	2				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?			
10	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?			
10	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?			
10	0	0				SE 117. Is this student making progress in meeting the annual goals of his/her current IEP?			
10	0	0				SE 117a. In your opinion, is this student benefiting from participation in the general education classroom?			
0	0	0				SE 117b. If yes, in what ways? Peer interaction is made readily available. Is successful in all classes and goal setting is occurring to analyze progress. Opportunities for peer interaction and curriculum participation are made available. Is making progress at grade level in subject areas. Is able to be successful and complete required activities as needed in the general education environment. There is access to peer interaction. Participation has enabled growth in academics and social skills. Has opportunities for socialization, in the regular education classroom that has supported academic development. Is able to perform well with age level peers. It enables social skill development at grade level. Has opportunities for social interaction with peers.			
0	0	10				SE 117c. If no, what does this student need that he/she is not receiving?			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
10	0	0				SE 118. Is the progress on annual goals recorded and reported to the parent based on objective and measurable data?			
						IEP IMPLEMENTATION			
						INTERVIEW RESULTS (Parent, General & Special Education Teacher)			
9	0	0	0			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?			
9	0	0	0			P 49. Are the special education and related services included in your child's current IEP provided at no cost to you?			
					9 0 0 0 0 0	P 57. When all students in the school receive a report card, I also receive a progress report on my child's IEP goals. Always Sometimes Rarely Never Don't Know Does not Apply			
					9 0 0 0 0 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			
9	0	0	0			P 64. My child is receiving the supports and services agreed upon at the IEP meeting.			
8	0	2				GE 77. If supports for school personnel are included in the student's current IEP, has the LEA provided those supports?			
10	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?			
6	0	4				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?			
1	5	4				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	9				GE 79c. If yes, what reasons were discussed for recommending removal?			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
						Need for additional specialized instruction.			
0	0	9				GE 79d. If yes, how was the amount of time that this student would be removed from the general education classroom decided? Based upon current skill level and progress data.			
6	0	4				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?			
2	0	8				GE 84. If appropriate, are you implementing the positive behavior support plan for this student as written in the current IEP			
10	0	0				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?			
10	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?			
10	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?			
10	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	1				SE 111. If supports for school personnel are included in this student's current IEP, has the LEA provided those supports?			
9	0	1				SE 113. If required, were the testing accommodations included in this student's current IEP implemented?			
10	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	1				SE 120. Is this student receiving the supports and services agreed upon in his/her current IEP, including related services?			
						PROVISION OF ESY AND RELATED SERVICES INTERVIEW RESULTS (Parent & Special Education Teacher)			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
6	0	3	0			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?			
9	0	0	0			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?			
7	2	0	0			P 44. Did you receive an explanation of what would make your child eligible for ESY services?			
7	1	0	1			P 45. Did you agree with the IEP team's conclusion about your child's eligibility for ESY services?			
0	1	8	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?			
4	0	4	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?			
10	0	0				SE 121. Was the consideration of ESY eligibility discussed during this student's current IEP meeting?			
7	0	3				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	0	10				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	0	10				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?			
0	0	10				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?			
0	0	10				SE 122d. Does this student need supplementary aids and services to participate in non-academic and/or extra-curricular activities?			
0	0	10				SE 122e. If yes, are needed supplementary aids and services being provided to this student?			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
0	0	10				SE 122f. Are there routine opportunities for this student to interact with non-disabled peers that are planned and/or facilitated by school personnel?			
						SECONDARY TRANSITION (Parent & Special Education Teacher)			
5	0	4	0			P 50. If your child is age 14 or older was he/she invited to participate in the IEP meeting for transition planning?			
9	0	0	0			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?			
2	7	0	0			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	7	0			P 50c. If yes, what reasons were discussed for recommending removal? Needed additional support in certain subject areas. Additional instructional time for needed academic areas.			
0	0	7	0			P 50d. If yes, how was the amount of time that your child would be removed from the general education classroom decided? Program needs. IEP team decision.			
9	0	0	0			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?			
9	0	0	0			P 50f. In your opinion, is your child benefiting from participation in the general education classroom?			
0	0	0	0			P 50g. If yes, in what ways? Loves school. I think attendance is important. Is able to interact with peers. Has socialization opportunities and is aware of the future and is able to plan for it. Is able to be with other students, and participate in the curriculum. Enjoys interaction with peers and working with staff. Is able to receive the appropriate amount of attention in the general education virtual classroom. Is able to receive individualized instruction and keep up with the general education curriculum. It has enabled peer interaction.			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
0	0	8	0			P 50h. If no, what does your child need that he/she is not receiving in the class?			
					5 1 0 0 0 3	P 59. I am satisfied with the transition services developed for my child. Always Sometimes Rarely Never Don't Know Does not Apply			
					7 0 0 0 1 1	P 60. My child is learning skills that will lead to a high school diploma and further education and/or employment. Always Sometimes Rarely Never Don't Know Does not Apply			
7	0	3				SE 116. Were this student's desired post school outcomes considered when the IEP team developed the annual goals?			
9	0	1				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?			
						Topical Area 6: NOREP/PWN			
						(File Reviews)			
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			
10	0	0				FR 333. A description of the other options the IEP team considered and the reason why those options were rejected			
10	0	0				FR 334. Description of each evaluation procedure, assessment, record or report used as the basis for proposed action or action refused			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
9	0	1				FR 335. Description of other factor(s) relevant to LEA's proposal or refusal			
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			
10	0	0				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.)			
10	0	0				FR 339. Parent has selected a consent option			
10	0	0				FR 340. NOREP/PWN reflects the educational placement indicated on the student's IEP			
						INTERVIEW RESULTS (Parent)			
0	0	9	0			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?			
					8 1 0 0 0 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			
						Topical Area 7: Additional Interview Responses			
						INTERVIEW RESULTS (Parent & Special Education Teacher)			
					6 3 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			P 66. Tell me anything you really like about your child's special education program.			

Y	N	NA	DK	Not Obs	% #	Citation	Required Corrective Action Evidence of Change	Timelines and Resources	Closed Date
					1 2 1 3 2 5 4	c. staff-aide ratios d. staff's knowledge, training e. instructional materials g. staff open to suggestions, good communication i. support services k. staff's understanding and attitude n. other Has improved academically. Able to progress very well. They care. Flexibility of staff and staff access.			
		4	1		4	P 67. Tell me anything you would like to change about the program. n. other There is often a two day delay in teachers responding to questions sent in for review. Sometimes teachers push only certain ways to do certain activities. Difficulties with the virtual nature of the program. Pre-teaching of certain academic concepts would be very beneficial as well as slowing down the pace of the programming depending on the rate of learning.			
		0	0		1 5 3	P 68. The school explains what options parents have if the parent disagrees with a decision of the school. a. Very strongly agree b. Strongly agree c. Agree			
						P 69. Additional comments about your child's program. Receives a lot of individualized time with staff. More information pertaining to Career Technical Centers. The program currently meets my child's needs. The program provides options and a progressive experience. I like the program.			
10	0	0				SE 101. Do you hold the required certification to implement this student's program?			
10	0	0				SE 101a. Have you received sufficient training, technical assistance and other support to teach this student?			
0	0	10				SE 101b. If no, what training or support would assist you?			
						Topical Area 8: Other Non-compliance Issues			
						Topical Area 9: Other Improvement Plan Issues			

Standard Operating Procedure
Title: Pre-IEP and IEP Meeting Process

Department	Special Education Department		Version No. PDLCS 2020 v. 1.3
Prepared by:	Stephanie Faith	Date:08/17/2020	Supersedes: PDLCS 2020v1.2
Approved by:	Stephanie Faith	Date:08/17/2020	Date Issued:08/18/2020
Last reviewed by:	Stephanie Faith	Date: 06/29/2022	

Document Owner: Special Education

Affected Parties: Special Education Teachers and Regular Education Teachers

Purpose: This procedure identifies the necessary steps Special Education Teachers need to take for preparation of an IEP meeting and after the meeting.

Data Needed: Caseload of students, IEP/MDE spreadsheet, Previous IEP data, RR reports, draft of proposed goals, and any standardized testing information

Resources Needed: IEP Writer, Pre IEP Checklist, IEP Checklist

Guidelines and/or Procedures:

1. Teachers - Print report from IEP Writer
 - a. Report Tab to School Age Tab to "RR/IEPs Due by Date" Tab then type in specific dates.
 - b. Schedule IEP Meeting with parent – this meeting fits our time frame and we have to allow for three attempts and 10 day review, so think of this when scheduling the meeting.
 - c. If you leave a message, make sure you email the parent as well.
 - d. Document all attempts in the SIS.
 - e. Schedule your IEPs over the course of the school year, so that they are scheduled ahead of due date and spaced out to allow time to write and progress monitor. This can be done in August when teachers return for the school year.
2. Send out email using Google calendar feature notifying individuals of the meeting
 - a. Include the following – Parent/Guardian, Student, Principal, Special Ed Coordinator, Special Ed Records Specialist, Regular Education Teachers (must include 1), Counselor, School Psych (if needed), any Related Service provider, OVR or transition support (for ages 14 and older).
 - b. If Student is fourteen years of age or older, you MUST include student on list of participants (NOT REQUIRED TO SEND INVITATION TO STUDENTS)
 - c. If there is an outside agency involved, include that individual on the email.
 - d. In body of the email, include the following:
 1. Student's Name: Initials only
 2. Grade:
 3. Date:
 4. Time:
 5. Special Education Teacher:
 6. Regular Education Teacher (s):
 7. Counselor
 8. Related Service Provider(s) (if applicable):
 9. OVR Representative (if applicable):

- e. Please complete the email using Google and the calendar feature
 - f. Attach the Google Meet cheat sheet for parents to access for all meetings.
3. Attach to the email the following documents:
 - a. Completed Invitation to the IEP Meeting and FINALIZE
 - b. Procedural Safeguards Letter and FINALIZE
 - c. SE Records Specialist will receive all signed documents and file them accordingly.
4. Teachers will be responsible for scheduling all IEP Meetings. Schedule meetings in a timely manner, do not want to wait until a week prior to when the IEP is due. **Schedule meetings at least 30 days in advance.**
5. **Excuses for not scheduling IEP Meetings or meetings not held within the timelines will not be accepted. If this issue arises, then a meeting with Special Education Coordinator will occur and a plan will be developed.**
6. The first meeting scheduled is the actual IEP. Even if the parent does not show, everyone else reviews the IEP. Then, 2nd and 3rd attempts are scheduled by the special education teacher.
 - a. 1st IEP Meeting: Thursday, October 8, 2020
 - b. 2nd/3rd Attempts (if needed): Tuesday, October 13 and Thursday, October 15.
 - c. IEP and NOREP Paperwork sent out: Within 72 hours of first IEP meeting
7. Once the Special Education Records Specialist receives the Google invite, she will send out the input form to the teachers.
8. All IEP meetings will be held online via Google Meet If they are not able to attend online, offer phone conference.
9. Make sure you have the IEP Outline and Student led IEP meeting (if applicable) ready to share at the meeting.
10. If there is enough information for Progress Monitoring, download on your desktop so you can share this as well. You will use this when discussing present levels.
11. Log into Google Meet at the meeting time.
12. Greet parent and student (if applicable) and introduce them to the team in attendance.
13. Make sure the demographics on the first page are correct, and verify with the parent. If there are any changes, notify SE Records Specialist and Records following the meeting.
14. Go through each section of the IEP and have students present the Student led IEP.
15. Once the IEP has been discussed, explain the signature on the IEP and Procedural Safeguards is just to indicate they were present in the meeting and received the Procedural Safeguards. Explain the process of e-mailing home documents, reinforcing access to parent email and also 72 hour timeframe.
16. Once the IEP is ready to send (within 72 hours of IEP meeting) – send home for electronic signatures and document first attempt in SIS. Send home NOREP as well. The Special Education Assistant will receive all complete signed documents weekly and file accordingly. Please include OVR paperwork as well.
17. If a member needs to be excused, make sure you send the permission to excuse document.

Standard Operating Procedure
Title: After the IEP Meeting

Department	Special Education	Version No. PDLCS-2022v1.2
Prepared by:	Stephanie Faith	Date:6/15/2022
Approved by:	Stephanie Faith	Date:6/15/2022
Last reviewed by:		Date:

Document Owner: Special Education

Affected Parties: Special Education Teachers

Purpose: This procedure identifies steps needed to be taken after an IEP meeting.

Data Needed: N/A

Resources Needed: N/A

Guidelines and/or Procedures:

1. Write the IEP. Once all of the current data is in the IEP and it is reviewed by Special Education Coordinator, finalize the IEP. Special Education Coordinator does not have to review all IEP's, but they can be pulled for review for compliance. If you have a question or would like her to review it, please ask.
2. Once finalized, the signature page is automatically sent for e-signature.
3. For all students, a new NOREP will be needed with the date of the IEP.
4. Send cover sheets to SE Assistant. Make sure you make a pdf of the cover and signature pages of the IEP. These need to be sent to SE Assistant using the proper email address and cover sheet as the subject.
5. Send PTR if it was decided during the IEP meeting at a student needs an FBA or any other service.
6. When PTR is signed and confirmed, complete a testing referral form if necessary.
7. Send all IEP documents out for e-signatures.
8. If the documents are not returned within a week, make 2 more attempts via phone call/email/certified mail. Document and print all 3 attempts.
9. Once the Invite, IEP, NOREP, and PTR (if needed) is signed and returned, print it and give to SE Assistant on a WEEKLY basis. Make sure you write the dates the documents were sent and returned along with attempts.
10. Write and/or revise the Progress Monitoring form. Always check the google calendar form to make sure the link is the same for the teachers.
11. Send the teachers/counselor the IEP at a glance. This will give them summary of the goals and SDI's.
12. Submit related service referral form for any related services once NOREP is signed or the 10 days has passed (for current students).
13. Email OVR application information/consent form.
14. Complete the Penn Data form for SE Assistant.

Standard Operating Procedure

Title: IEP and Evaluation Input forms

Department	Special Education		Version No.	PDLCS-	
Prepared by:	Mary Alicandro	Date:06/22/2022		Supersedes:	
Approved by:		Date:		Date Issued:	

Document Owner:

Affected Parties: Special Education Teachers, Regular Education Teachers, Special Education Records Specialist, Related Service Providers

Purpose: This procedure will provide information on sending out the IEP and Evaluation Input forms.

Data Needed: IEP and Evaluation Input forms,

Resources Needed: IEP writer, SIS, and Student Services “Y” drive for testing scores

Guidelines and/or Procedures:

FOR IEP INPUT FORMS:

- 1. Two weeks prior to when a student has been scheduled for an IEP meeting the Special Education Records Specialist will send an email with the appropriate forms attached to the student’s regular education teachers, counselor, elective teacher, MTSS teacher, and related services provider(s). The email will state: To All: Student Name is scheduled for an IEP meeting. Please fill out the appropriate form and return it to me by Date. Reply to this email with your form attached. All forms must be in Word format. Please name your file as follows: Student Last Name, First Name, Subject, Your Name. Thank you.**
- 2. In most cases, one week will be given for the forms to be completed and returned. There may be an occasion when there is an emergency need for information and forms will be asked to be completed immediately.**
- 3. The Special Education Records Specialist will check periodically to see who has sent a form in and who has not. A reminder email will be sent only to those who have not sent in a form. The forms are saved to the (S) special education drive in the folder named: Current School Year, IEP_Eval_Reeval Form, by student name.**
- 4. One week prior to the IEP meeting, all forms that were sent for the student are sent to the student’s special education teacher.**

FOR EVALUATION/REEVALUATION/RECORD REVIEW FORMS:

- 5. Three weeks prior to when a student has been scheduled for an Evaluation, Reevaluation or Record Review, the Special Education Records Specialist will send an email with the appropriate forms attached to the student’s special education teacher, regular education teachers, elective teacher, counselor, MTSS teacher, and related services provider(s). The email will state: To All: Student**

Name is scheduled for an Evaluation/Reevaluation/Record Review meeting. Please fill out the appropriate form and return it to me by Date. Reply to this email with your form attached. All forms must be in Word format. Please name your file as follows: Student Last Name, First Name, Subject, Your Name. Thank you.

- 6. In most cases, one week will be given for the forms to be completed and returned. There may be an occasion when there is an emergency need for information and forms will be asked to be completed immediately.**
- 7. The Special Education Records Specialist will check periodically to see who has sent a form in and who has not. A reminder email will be sent only to those who have not sent in a form. The forms are saved to the (S) special education drive in the folder named: Current School Year, IEP_Eval_Reeval Form, by student name**
- 8. The Special Education Records Specialist will complete a Student Data form for the student and check on the Y drive, Student Records, Student Records Do Not Delete file to see if any current testing scores are in the folder for the student. If test scores exist, copy and save the files to the student's file on the S drive, Special Education, Current School Year, IEP_Eval_Reeval Form, by student name.**
- 9. At least one week prior to the due date of the report the Special Education Records Specialist will send an email to the school psychologist with all of the forms and test scores attached.**



Function-Based Support for Students with Autism

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www.BasicFBA.com

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Session Description

- Using Functional Behavior Assessment (FBA) to inform Behavior Intervention Plans (BIPs) is an important evidence-based intervention for many students with autism. This session will provide resources and review the features of effective implementation of FBA/BIP to support the inclusion of students on the autism spectrum in schools. Free training resources will be provided with an implementation model focused on increasing skills and knowledge of building administrators, building behavior specialists, teachers, and staff to maximize collaboration with families and external behavior specialists in supporting the challenging behaviors of students with autism.



Introductions

- Who is here today?
 - Special Education Teachers?
 - Administrators?
 - Paraprofessionals?
 - District Behavior Specialists/BCBAs/Autism Specialists?
 - Outside consultants?

- Who is Responsible for conducting FBA and building BIPs?

A decorative graphic on the left side of the slide. It features a solid red arrow pointing to the right, positioned horizontally. Behind the arrow and extending upwards and to the right are several thin, dark grey, curved lines that create a sense of movement or flow.

Why is Functional Behavior Assessment Important for Students with Autism?



Functional Behavior Assessment & Autism

- Function-Based Assessment and Intervention are a commonly identified Evidence-Based Intervention for students on the autism spectrum
- Much of the research supporting FBA/BIP came from studies on students with autism

Evidence Based Practices for Children, Youth and Young Adults with Autism

Hume, K., Steinbrenner, J. R., Odom, S. L., Morin, K. L., Nowell, S. W., Tomaszewski, B., Szendrey, S., McIntyre, N. S., Yücesoy-Özkan, S., & Savage, M. N. (2021). Evidence-Based Practices for Children, Youth, and Young Adults with Autism: Third Generation Review. *Journal of autism and developmental disorders, 51(11), 4013–4032.*

- Antecedent-based interventions
- Augmentative and alternative communication (AAC)
- Behavioral momentum intervention
- Cognitive/behavioral instructional strategies
- Differential reinforcement of alternative, incompatible or other behavior
- Direct instruction
- Discrete trial training
- Exercise and movement
- Extinction
- **Functional Behavioral Assessment*****
- Functional Communication training
- Modeling
- Music mediated intervention
- Naturalistic intervention
- Parent implemented intervention
- Peer-based instruction and intervention
- Prompting
- Reinforcement
- Response interruption/redirection
- Self Management
- Sensory integration
- Social Narratives
- Social skills training
- Task Analysis
- Technology aided instruction and interventions
- Time delay
- Video modelling
- Visual supports

Evidence Based Practices for Children, Youth and Young Adults with Autism

Interventions regularly used in the FBA/BIP process

- Antecedent-based interventions
- Augmentative and alternative communication (AAC)
- Behavioral momentum intervention
- Cognitive/behavioral instructional strategies
- Differential reinforcement of alternative, incompatible or other behavior
- Direct instruction
- Discrete trial training
- Exercise and movement
- Extinction
- **Functional Behavioral Assessment*****
- Functional Communication training
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- Music mediated intervention
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- Social Narratives
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- Task Analysis
- Technology aided instruction and interventions
- Time delay
- Video modelling
- Visual supports



Individualizing Intervention Across the Spectrum (Tier 1 to Tier 3)

Problematic tendencies w/ Behavioral intervention for students with autism:

- 1) “You’re only a little autistic” □ All or none autism
- 2) Intervention by stereotypes □ limited individualization
- 3) Waiting for a “Hero” (BCBA or District Specialist)

Autism Spectrum

<https://www.kidshealth.org.nz/understanding-autism-spectrum-comic-strip-explanation>

Sometimes when people think of this word, they think of the autism spectrum as being like this:




A very linear looking 'spectrum', which gives the impression that people range from being 'a little autistic' to 'very autistic'.

Hm. How can you be 'a little autistic'?

It's that vague language that I always find confusing.



A hand from the top of the frame holds a string that is attached to a small boy. The boy is standing on a horizontal pink bar that represents an autism spectrum. The boy is positioned towards the left side of the bar, indicating he is on the 'Not autistic' end. The hand is pointing towards the boy.

The problem with thinking of the spectrum in this way, is that a perception of an autistic person also becomes linear.

You're only a little autistic, Archie.

Hm. I still don't understand, can you be less vague?

You're able to have a normal conversation with me and act pretty normal! You're not severely autistic.

Not autistic

Very autistic

Not autistic

Very autistic

...And so you see, if someone thinks you're on a 'low end' of this spectrum, this often happens:



1

Archie you can handle all of this just fine, you're not *that* autistic.



Leading to?

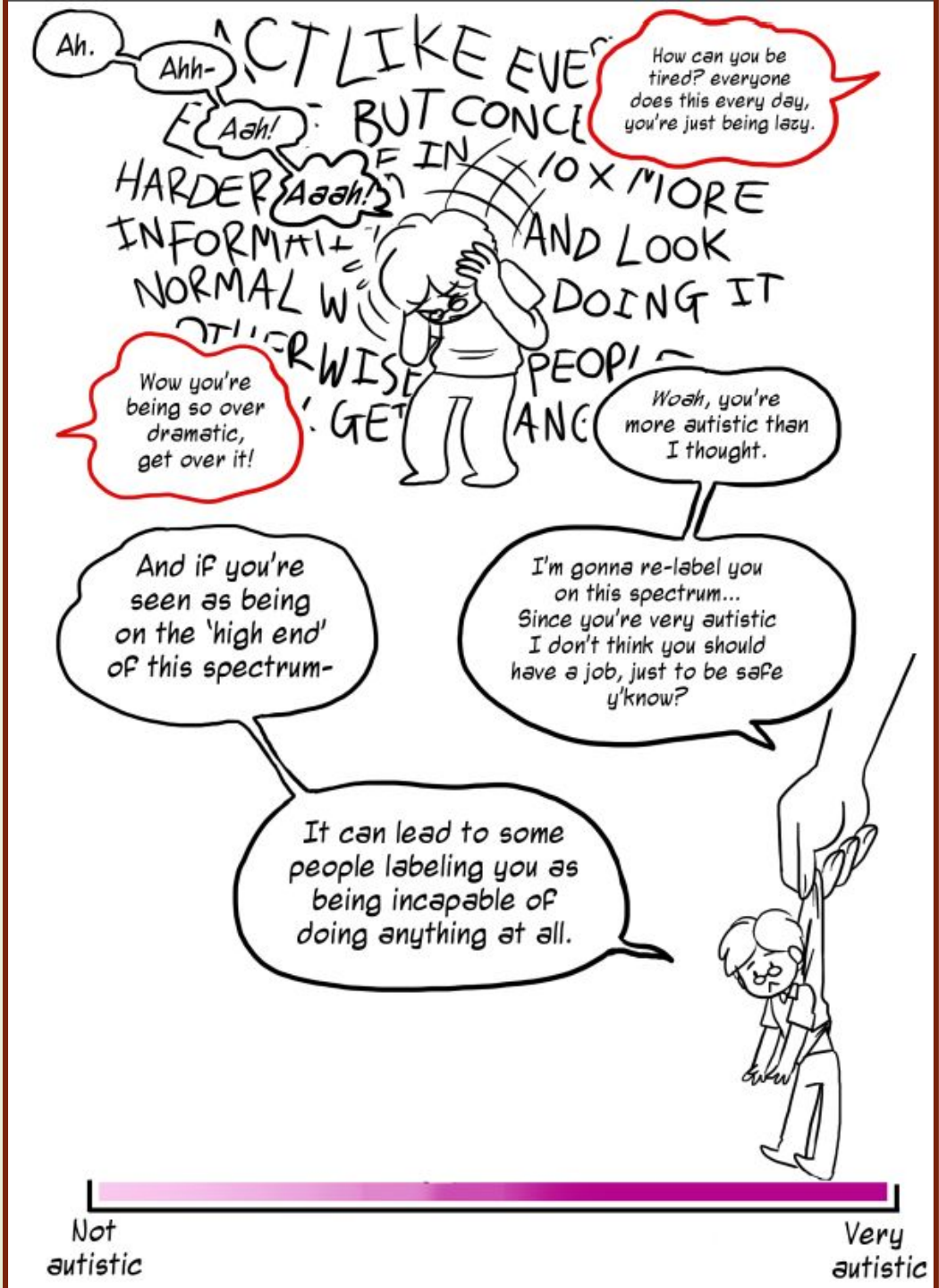
Challenging Behaviors

What can help?

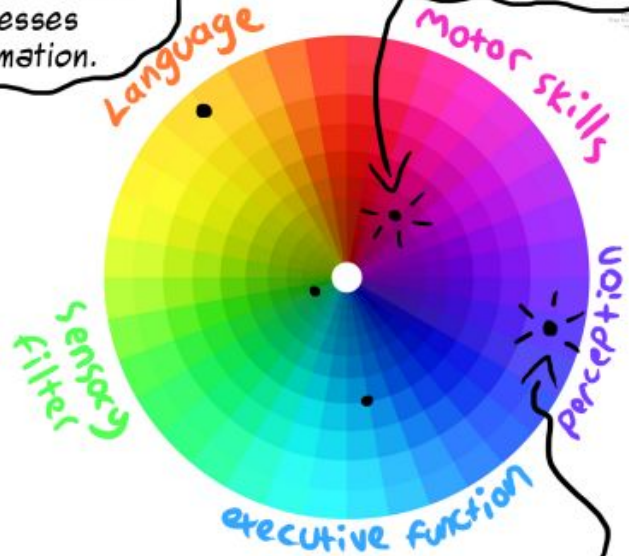
- Better equip All teachers (Tier 1) in the Basics of Behavior, Function and Individualizing Support



<https://www.kidshealth.org.nz/understanding-autism-spectrum-comic-strip-explanation>



The spectrum consists of many different 'traits', or ways in which the brain processes information.



Some traits create difficulties in every day life. (hence being diagnosed)

But also many traits are useful in every day life.



Each person with autism will have a set of traits all in different areas of the spectrum. The areas where they don't have a trait will function no differently to a neurotypical brain, but may be affected by circumstances. In example, I am good at making conversation (language). But I get sensory overload in loud and crowded spaces, which then makes conversation very hard for me.



The Spectrum of ASD

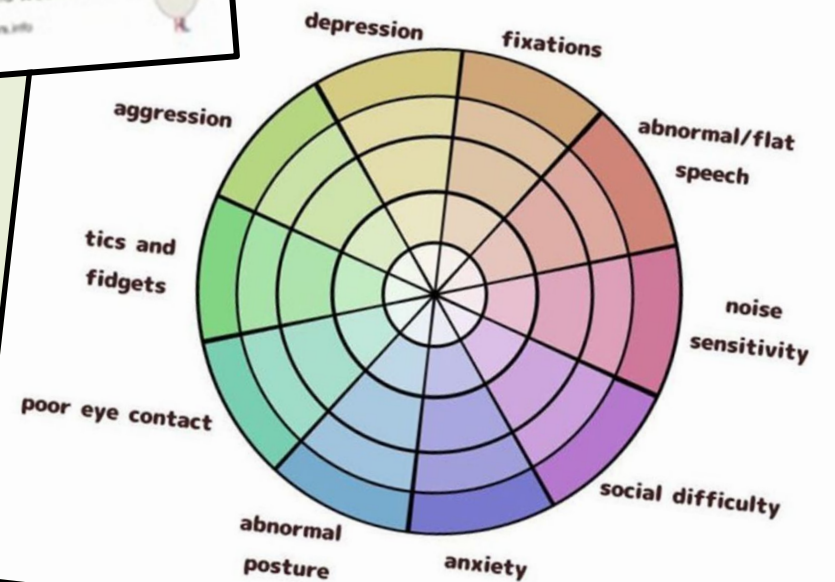


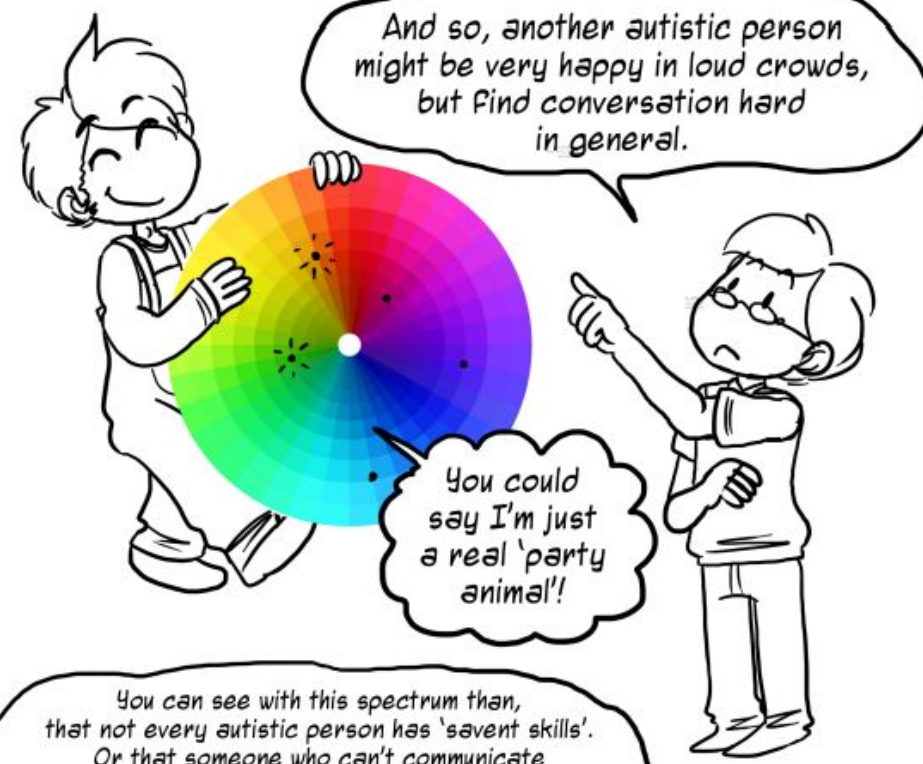
The diagram helps to visually represent how the spectrum applies to each of the individual dimensions of ASD. Every ASD person is different and has their own unique profile of strengths and weaknesses.

© Stephen Norwood - happyteachermom.info



what it can actually look like:

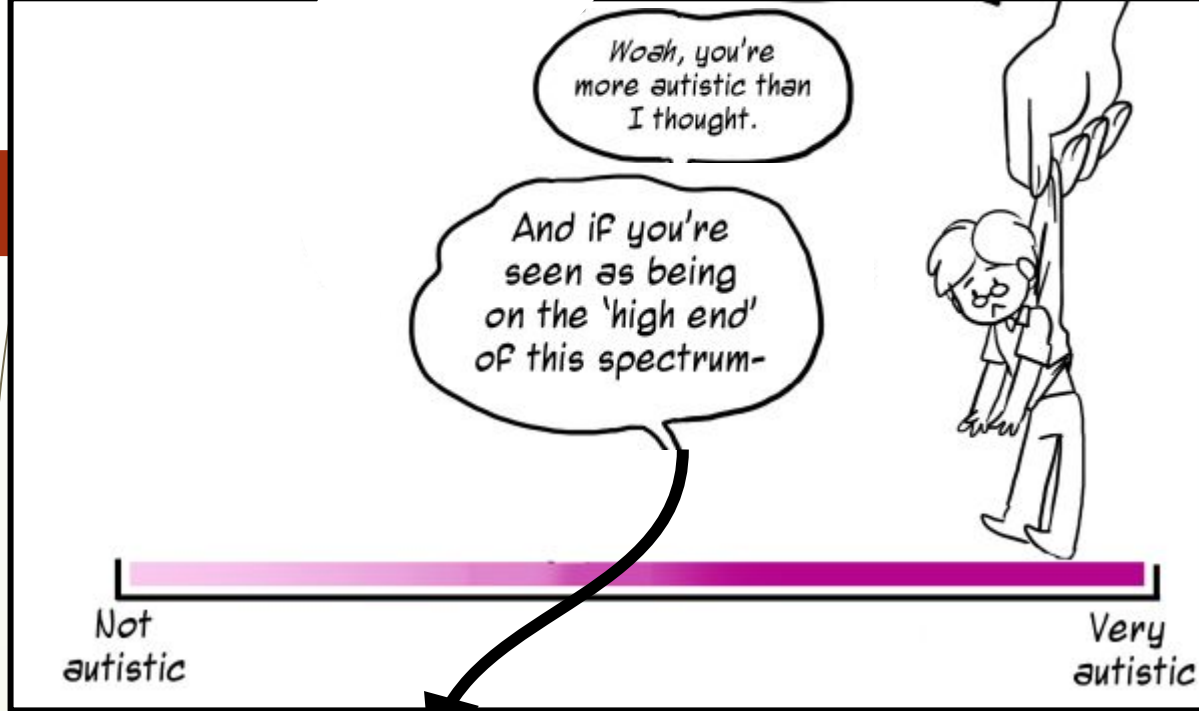




You can see with this spectrum that, that not every autistic person has 'savant skills'. Or that someone who can't communicate verbally might still understand what you're saying, but just need a different way to communicate, such as sign language.



<https://www.kidshealth.org.nz/understanding-autism-spectrum-comic-strip-explanation>



#2 □ Intervention x Stereotype

- What can help?
- Using FBA as a guide for understanding individualized needs and matching to appropriate interventions

For students considered “**Very Autistic**”, there can be a tendency toward (#2)“**Intervention x Stereotype**” resulting in common interventions, even evidence-based interventions, haphazardly thrown at the student that aren’t aligned with the student’s individual strengths and needs:

“Hey, let’s try...

- a weighted vest.... a sensory room..... social stories...



Why is FBA so important for students with Autism?

- There is as much variability across students on the autism spectrum, as there is for those who are not considered on the spectrum
- There are many evidence-based interventions recommended for students, but each can be used more and less effectively
- **Individualizing interventions is Critical!**
- It's critical to match the right interventions to the right circumstances and research suggests Function of Behavior is often our best guide





Why is the function of behavior important?



(Click numbers to reveal information)

1

Any intervention can potentially make problem behavior:

- Better 
 - **Have no effect** 
 - **Make it worse** 
-  

2

Using function to guide selection of interventions should help to more efficiently identify effective interventions & avoid interventions that can make things worse.



What is Functional Behavior Assessment?



Functional Behavioral Assessment (FBA)

An empirically supported assessment practice that identifies factors that predict and maintain student behavior and lead to identifying the function of student behavior that is demonstrated to improve both the effectiveness & efficiency of behavioral interventions in schools

(Blair, Umbreit, & Bos, 1999; Carr et al., 1999; Epstein, Atkins, Cullinan, Kutash, & Weaver, 2008; Ingram, Lewis-Palmer, & Sugai, 2005; Lee, Sugai, & Horner, 1999; Loman & Horner, 2014; Newcomer & Lewis, 2004, Strickland-Cohen & Horner, 2015; Strickland-Cohen, Vatland, Spear, & Romer, in prep)

Types of Functional Behavior Assessment (FBA)

- a) Indirect Functional Assessment - information is gathered based on the personal observations of those who are around the child frequently using interviews, questionnaires, etc.
- b) Direct Functional Assessments – includes a trained behavior specialist directly observing the child in their natural environment to identify patterns of behavior, specifically the Antecedents-Behavior-Consequences (ABCs)
- c) Functional Analysis – assessment using experimental manipulation to test through data collection the function of student behavior

FBA/BIP in Schools: How are we doing?

- Growing body of research showing that FBS can be effectively designed and implemented by typical school personnel
 - (Crone, Hawken, & Bergstrom, 2007; Dukes, Rosenberg, & Brady, 2007; Loman & Horner, 2014; Maag & Larson, 2004; Renshaw et al., 2008; Scott, Nelson, & Zabala, 2003; Strickland-Cohen & Horner, 2015)
- However...
 - FBA continues to be underutilized
 - Schools continue to struggle to utilize FBA information to build and implement individualized supports
 - (Blood & Neel, 2007; Cook et al., 2007, 2012; Scott & Kamps, 2007; Scott, Liaupsin, Nelson, & McIntyre, 2005; Van Acker, Boreson, Gable, & Potterton, 2005)

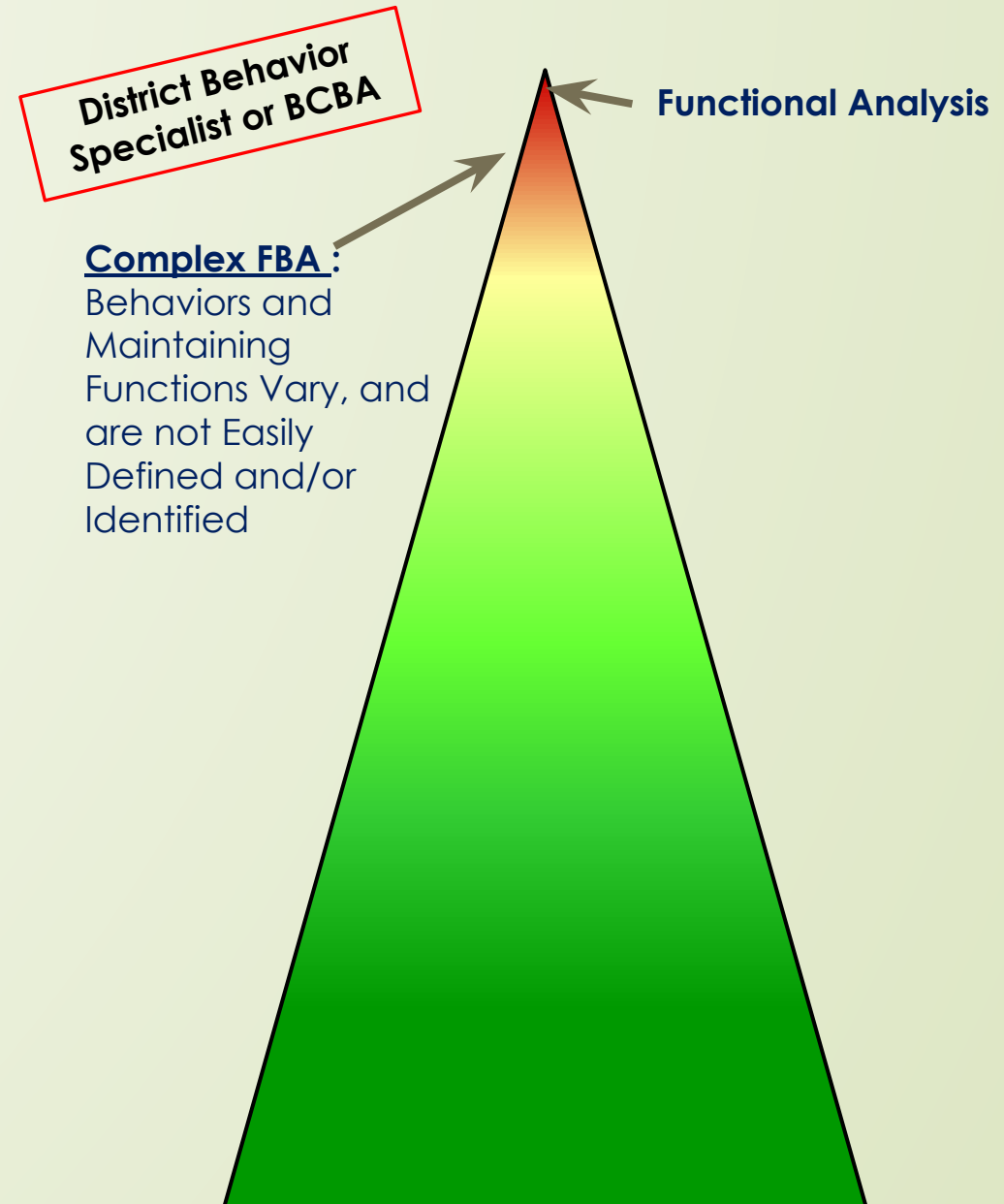


Why is FBA Underutilized In Schools?

- We often use our most effective tools only after challenging behaviors have become severe and/or dangerous (Scott et al., 2010)
- FBA/BIP only seen as a legal requirement to be used under most severe circumstances
- Use of FBA is Driven by the Law, rather than used as a more proactive support

The “Hero” Model of Behavior Support

- As a result:
 - FBA/BIP is often limited to use under extreme, dangerous, or emergency situations
 - only people with “specialized training” are to conduct FBA/BIP (e.g. District Specialists, School Psychologists, BCBAAs)



#3 □ **Waiting for a Hero**

- Challenges of the “Hero” model:
 - Hero can quickly be overwhelmed with requests triggering a “triage” approach to behavior support
 - Opportunity for early intervention is often missed while waiting for problem to reach severity to warrant a “Hero”
 - “Hero” tends to walk in to very challenging situations with teacher who is often already “burned out” with the student
 - School often lacks infrastructure, practices and processes for FBA/BIP so struggles to support the Hero’s efforts

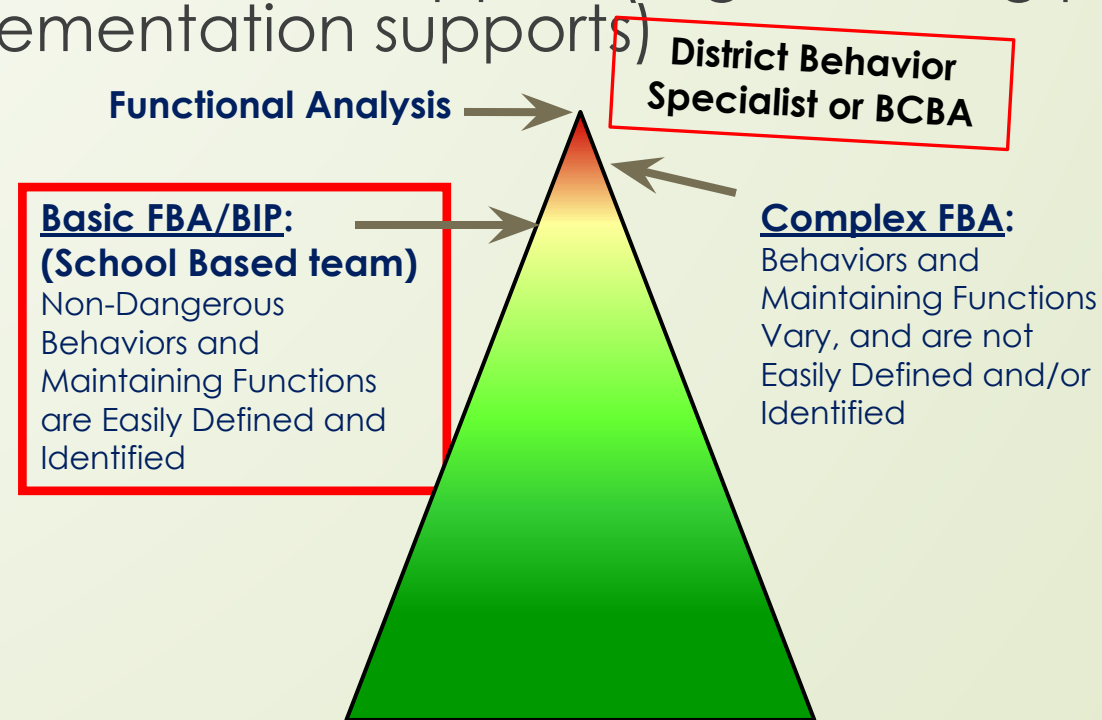
FBA/BIP

Hero and Host

- Challenge: Without a Host environment to effectively support the guidance of the Behavior Specialist/BCBA, plans often fail to be implemented effectively
- Sometimes they fail because:
 - the “Hero” may not know/understand the context, politics and personalities in the building
 - the implementers have not been actively involved in the selection of interventions they are being asked to implement
 - the hero is not available to provide timely encouragement, support and feedback to implementers in the building, because they are not there everyday
 - the hero is not readily available to support the adaptive needs of a teacher who is already “Done” with a student we’re trying to support

What can help? Creating Host Environments that can maximize the expertise and participation of outside specialists

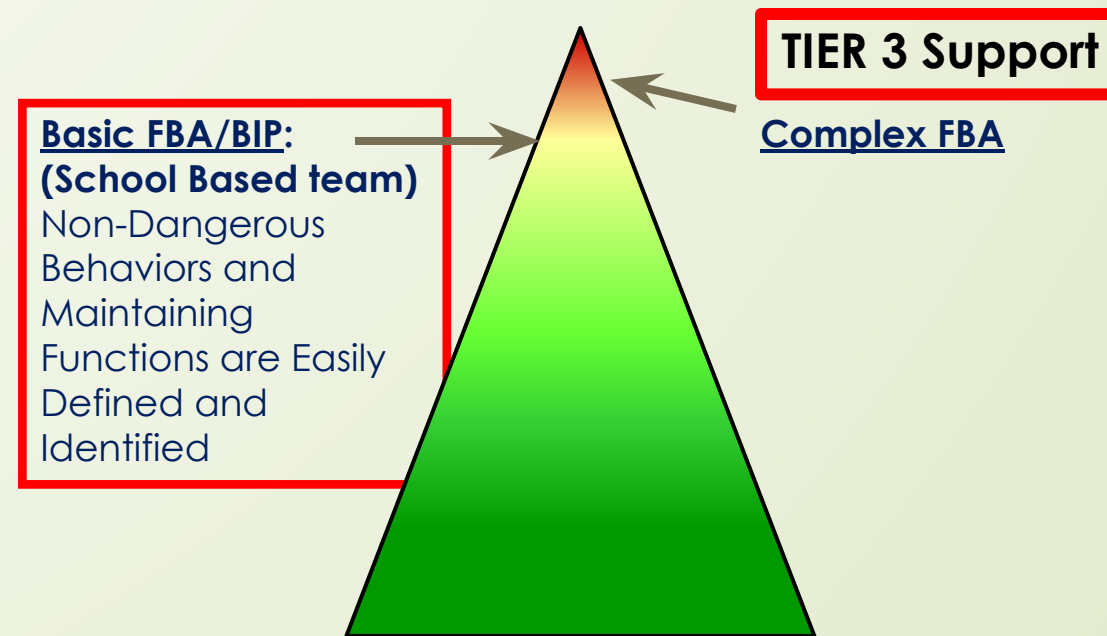
- Train a School-Based Team in Basic FBA to BIP to Build Capacity within the Building
 - Opportunity for “Hero” to build from existing plans and knowledge of the student
- Develop the Routines and Practices that support Function-Based Support (e.g. teaming processes & implementation supports)



Building Level Capacity for Function-Based Support

A Proactive Approach to Behavior Intervention Planning

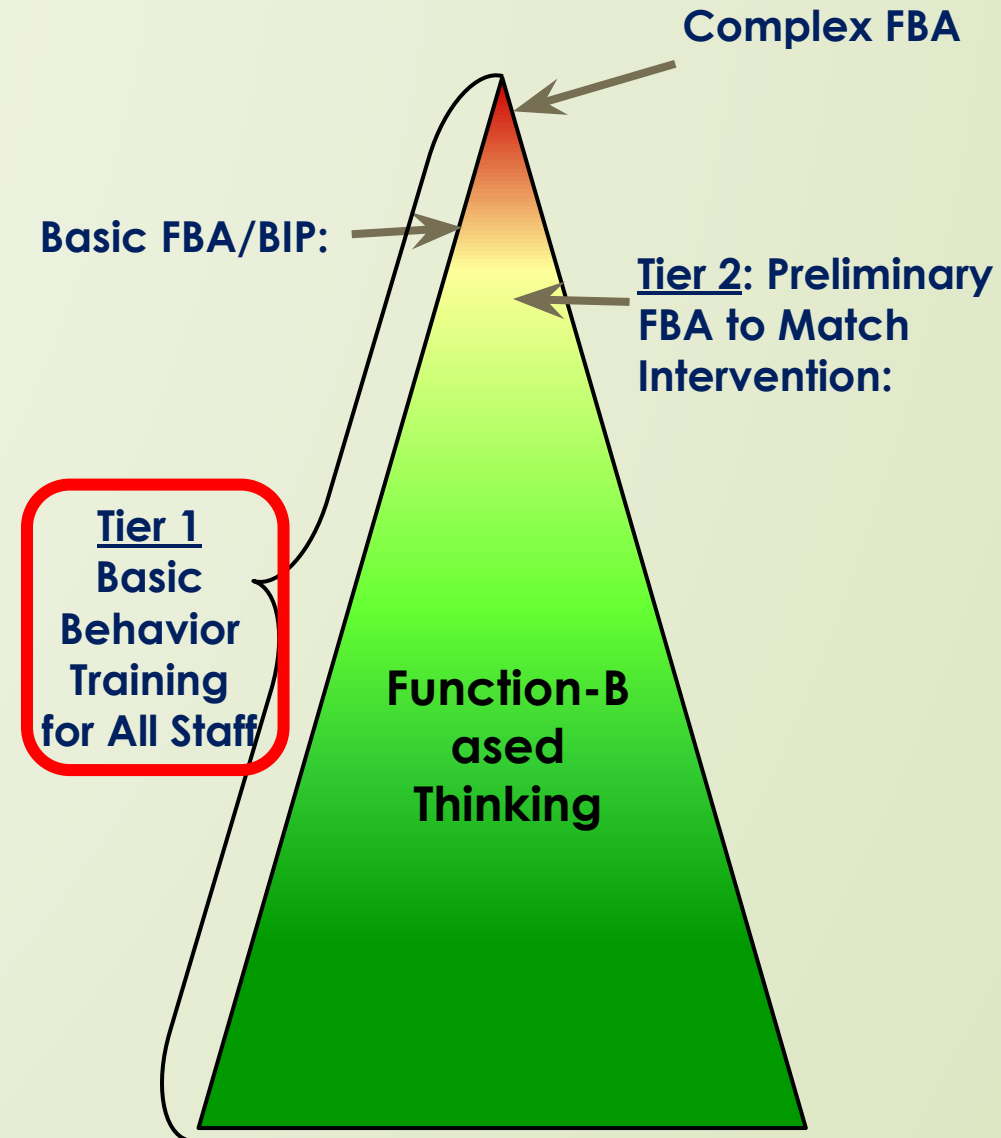
- Many of the problem behaviors that teams encounter do not require complex FBA-BIP
- Identify students early & provide support early, prior to Teacher “Burn Out” with the student
 - Using simplified FBA-BIP procedures that “match” the level and intensity of problem behavior



A Continuum of Function-Based Assessment & Intervention

□ #1 □ “Just a little autistic.”

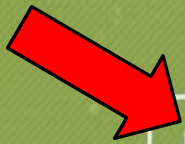
□ Collecting data to understanding individual needs of student demonstrating initial behavioral challenges



www.BasicFBA.com

Basic FBA to BIP

Welcome! Use the buttons below to take you to the training modules. The Behavior Specialist Training includes all 7 modules and is for those who will be the leading behavior support efforts in the school. The School-wide Training consists of two modules for all staff in the school. The top navigation bar will provide information on how to most effectively use these training resources and don't miss the blog below.



BEHAVIOR SPECIALIST TRAINING

SCHOOL-WIDE TRAINING

FBA in Schools

- Basic FBA to BIP
- Complex FBA
- Functional Analysis
 - FA should only be conducted by trained professionals (e.g. BCBA, Psychologist); FA are rarely completed by school-based personnel

Basic vs. Complex FBA/BIP



Focus of this training series

	Basic	Complex
For:	Students with mild to moderate problem behaviors (behaviors that are NOT dangerous or occurring in many settings)	Students with moderate to severe behavioral problems; may be dangerous and/or occurring in many settings
What:	Relatively simple and efficient process for behavior support planning based on “Basic” FBA data	Time-intensive process that involves emergency planning, family-centered planning, and collaboration with outside agencies
Developed by:	Team of school-based professionals (e.g., PBS team members whose job responsibilities include FBA and behavior support planning)	School-based team including professionals trained to develop and implement intensive interventions for students with severe problem behaviors (e.g., behavior specialist)

Basic FBA to BIP Training Series

Basic FBA to BIP Training Series

Module 1 - Defining & Understanding Behavior

Module 2 - FBA: Practice Interviewing

Module 3 - FBA: Practice Observing

Module 4 - Critical Features of BIP

Module 5 – Building BIP from FBA


Module 6 – Implementation Plan & Leading a BIP team

Module 7 – Evaluation Planning and BIP Review Meeting

Module 1 – Basics of Behavior

- Step by Step Training in understanding and identifying the A-B-Cs and Function of Behavior

The A-B-C's of Understanding Behavior



↓

Routine
Where: Place and Time

Antecedent:
(Trigger)
When _____ happens...

Behavior:
The student does (What) _____

Consequence:
...and as a result _____

Function (Why):
Therefore, the function of the behavior is to get/avoid _____

Click on each box to learn more...

ABC Tracker

Teacher completes in Classroom

- Teacher data collection tool for understanding individual triggers, consequences and function of behavior

2

ABC Tracker

Student Brenda Staff Mr. B Dates 10/24 - 11/1/20xx

Identify a student with recurring challenging behavior(s). Focus on a single routine (see p. 1 to prioritize & identify a routine) and track occurrences of the problem behavior during the prioritized school routine (subject or time of day). Track 5 occurrences of the behavior over the next 2 weeks and identify patterns and trends in occurrences to form a Summary Statement below.

Prioritized Routine/ Subject/ Activity (see p. 1) →		Less Structured Time w/ Peers (Morning Play & Recess)	Time of Day:	8:30-8:45 & 10:35-10:50
Date/Time	When... (Antecedent)...happens	The Student.... (Behavior)	And as a result.... (Consequence)	
<u>1st Incident</u> Date: 10/24 Time: 8:30 Morning Play	<i>Susan calls Brenda a "creep face" and laughs at her</i>	<i>Brenda punches Susan on the arm</i>	<i>Susan stops laughing and walks away</i>	
<u>2nd Incident</u> Date: 10/26 Time: 10:40 Recess	<i>A group of students at recess call Brenda fat</i>	<i>Brenda kicks several of them</i>	<i>The students run away</i>	
<u>3rd incident</u> Date: 10/27 Time: 8:45 Transition to Circle Time	<i>A peer laughs at Brenda when she trips on the carpet</i>	<i>Brenda pulls the child's hair</i>	<i>Brenda is sent to the office</i>	
<u>4th incident</u> Date: 11/1 Time: 10:45 Indoor Recess	<i>Brenda is playing blocks with Ben. Ben takes a block from Brenda</i>	<i>Brenda hits Ben over the head with another block</i>	<i>Ben puts the block down and runs away</i>	

Routine: Unstructured Time/Play

Antecedent/Trigger:
When other students call her names or tease her

Summary Statement

Behavior:
The student punch/kicks/pulls hair/ hits with a toy


Consequence/Outcome:
and as a result the peers go away and leave her alone

Therefore the function of the behavior is to get avoid peer negative comments/teasing.
(circle one)

Module 3 – FBA Observations

- Step by Step Training w/ video model and practice activities

Eddie's ABC Observation: Part 1



Watch this video of Eddie's behavior and track the ABC sequences on the first two lines of the ABC Recording form. See p. # in Participant Guide for Eddie's ABC Recording form or download here.

[Download Form](#)

[Play Video](#)

[Pause Video](#)

#	Time	Activity/Task	Trigger/Antecedent	Behavior	Outcome/Consequence
1	1:00	<input type="checkbox"/> Large group instruction <input type="checkbox"/> Small group work <input type="checkbox"/> Independent work <input type="checkbox"/> Unstructured time Specify: <i>Teacher not in classroom; late for class</i>	<input type="checkbox"/> Given task/asked question <input type="checkbox"/> Given directive/correction <input type="checkbox"/> Isolated (No attention) <input type="checkbox"/> No activity/unclear directions <input type="checkbox"/> Peer Comment <input type="checkbox"/> With Peers <input type="checkbox"/> Preferred activity removed <input type="checkbox"/> Transition: Change in activity Other/Notes:	<i>"Excuse me" in a sarcastic tone</i>	<input type="checkbox"/> Adult Attention Provided <input type="checkbox"/> Peer Attention Provided <input type="checkbox"/> Goal Preferred Activity/Item <input type="checkbox"/> Goal Other <input type="checkbox"/> Adult Attention Avoided <input type="checkbox"/> Peer Attention Avoided <input type="checkbox"/> Task/Activity Avoided <input type="checkbox"/> Avoided Other Other/Notes:
2		<input type="checkbox"/> Large group instruction <input type="checkbox"/> Small group work <input type="checkbox"/> Independent work <input type="checkbox"/> Unstructured time Specify: <i>Teacher not in classroom; late for class</i>	<input type="checkbox"/> Given task/asked question <input type="checkbox"/> Given directive/correction <input type="checkbox"/> Isolated (No attention) <input type="checkbox"/> No activity/unclear directions <input type="checkbox"/> Peer Comment <input type="checkbox"/> With Peers <input type="checkbox"/> Preferred activity removed <input type="checkbox"/> Transition: Change in activity Other/Notes:	<i>"I'll excuse you right in the mouth"</i>	<input type="checkbox"/> Adult Attention Provided <input type="checkbox"/> Peer Attention Provided <input type="checkbox"/> Goal Preferred Activity/Item <input type="checkbox"/> Goal Other <input type="checkbox"/> Adult Attention Avoided <input type="checkbox"/> Peer Attention Avoided <input type="checkbox"/> Task/Activity Avoided <input type="checkbox"/> Avoided Other Other/Notes:

ABC Recording Form

Observer: _____ Student: _____

Routine/Setting (Subject, gym, hall, etc.): _____ Date & Time: _____

What to Look for: (from FBA Interview summary)	Activity/Task	Trigger/Antecedent	Behavior	Outcome/Consequence
#	Time	<input type="checkbox"/> Large group instruction <input type="checkbox"/> Small group work <input type="checkbox"/> Independent work <input type="checkbox"/> Unstructured time Specify:	<input type="checkbox"/> Given task/asked question <input type="checkbox"/> Given directive/correction <input type="checkbox"/> Isolated (No attention) <input type="checkbox"/> No activity/unclear directions <input type="checkbox"/> Peer Comment <input type="checkbox"/> With Peers <input type="checkbox"/> Preferred activity removed <input type="checkbox"/> Transition: Change in activity Other/Notes:	<input type="checkbox"/> Adult Attention Provided <input type="checkbox"/> Peer Attention Provided <input type="checkbox"/> Goal Preferred Activity/Item <input type="checkbox"/> Goal Other <input type="checkbox"/> Adult Attention Avoided <input type="checkbox"/> Peer Attention Avoided <input type="checkbox"/> Task/Activity Avoided <input type="checkbox"/> Avoided Other Other/Notes:
1		<input type="checkbox"/> Large group instruction <input type="checkbox"/> Small group work <input type="checkbox"/> Independent work <input type="checkbox"/> Unstructured time Specify:	<input type="checkbox"/> Given task/asked question <input type="checkbox"/> Given directive/correction <input type="checkbox"/> Isolated (No attention) <input type="checkbox"/> No activity/unclear directions <input type="checkbox"/> Peer Comment <input type="checkbox"/> With Peers <input type="checkbox"/> Preferred activity removed <input type="checkbox"/> Transition: Change in activity Other/Notes:	<input type="checkbox"/> Adult Attention Provided <input type="checkbox"/> Peer Attention Provided <input type="checkbox"/> Goal Preferred Activity/Item <input type="checkbox"/> Goal Other <input type="checkbox"/> Adult Attention Avoided <input type="checkbox"/> Peer Attention Avoided <input type="checkbox"/> Task/Activity Avoided <input type="checkbox"/> Avoided Other Other/Notes:
2		<input type="checkbox"/> Large group instruction <input type="checkbox"/> Small group work <input type="checkbox"/> Independent work <input type="checkbox"/> Unstructured time Specify:	<input type="checkbox"/> Given task/asked question <input type="checkbox"/> Given directive/correction <input type="checkbox"/> Isolated (No attention) <input type="checkbox"/> No activity/unclear directions <input type="checkbox"/> Peer Comment <input type="checkbox"/> With Peers <input type="checkbox"/> Preferred activity removed <input type="checkbox"/> Transition: Change in activity Other/Notes:	<input type="checkbox"/> Adult Attention Provided <input type="checkbox"/> Peer Attention Provided <input type="checkbox"/> Goal Preferred Activity/Item <input type="checkbox"/> Goal Other <input type="checkbox"/> Adult Attention Avoided <input type="checkbox"/> Peer Attention Avoided <input type="checkbox"/> Task/Activity Avoided <input type="checkbox"/> Avoided Other Other/Notes:
3		<input type="checkbox"/> Large group instruction <input type="checkbox"/> Small group work <input type="checkbox"/> Independent work <input type="checkbox"/> Unstructured time Specify:	<input type="checkbox"/> Given task/asked question <input type="checkbox"/> Given directive/correction <input type="checkbox"/> Isolated (No attention) <input type="checkbox"/> No activity/unclear directions <input type="checkbox"/> Peer Comment <input type="checkbox"/> With Peers <input type="checkbox"/> Preferred activity removed <input type="checkbox"/> Transition: Change in activity Other/Notes:	<input type="checkbox"/> Adult Attention Provided <input type="checkbox"/> Peer Attention Provided <input type="checkbox"/> Goal Preferred Activity/Item <input type="checkbox"/> Goal Other <input type="checkbox"/> Adult Attention Avoided <input type="checkbox"/> Peer Attention Avoided <input type="checkbox"/> Task/Activity Avoided <input type="checkbox"/> Avoided Other Other/Notes:
4		<input type="checkbox"/> Large group instruction <input type="checkbox"/> Small group work <input type="checkbox"/> Independent work <input type="checkbox"/> Unstructured time Specify:	<input type="checkbox"/> Given task/asked question <input type="checkbox"/> Given directive/correction <input type="checkbox"/> Isolated (No attention) <input type="checkbox"/> No activity/unclear directions <input type="checkbox"/> Peer Comment <input type="checkbox"/> With Peers <input type="checkbox"/> Preferred activity removed <input type="checkbox"/> Transition: Change in activity Other/Notes:	<input type="checkbox"/> Adult Attention Provided <input type="checkbox"/> Peer Attention Provided <input type="checkbox"/> Goal Preferred Activity/Item <input type="checkbox"/> Goal Other <input type="checkbox"/> Adult Attention Avoided <input type="checkbox"/> Peer Attention Avoided <input type="checkbox"/> Task/Activity Avoided <input type="checkbox"/> Avoided Other Other/Notes:

General Observation Notes:

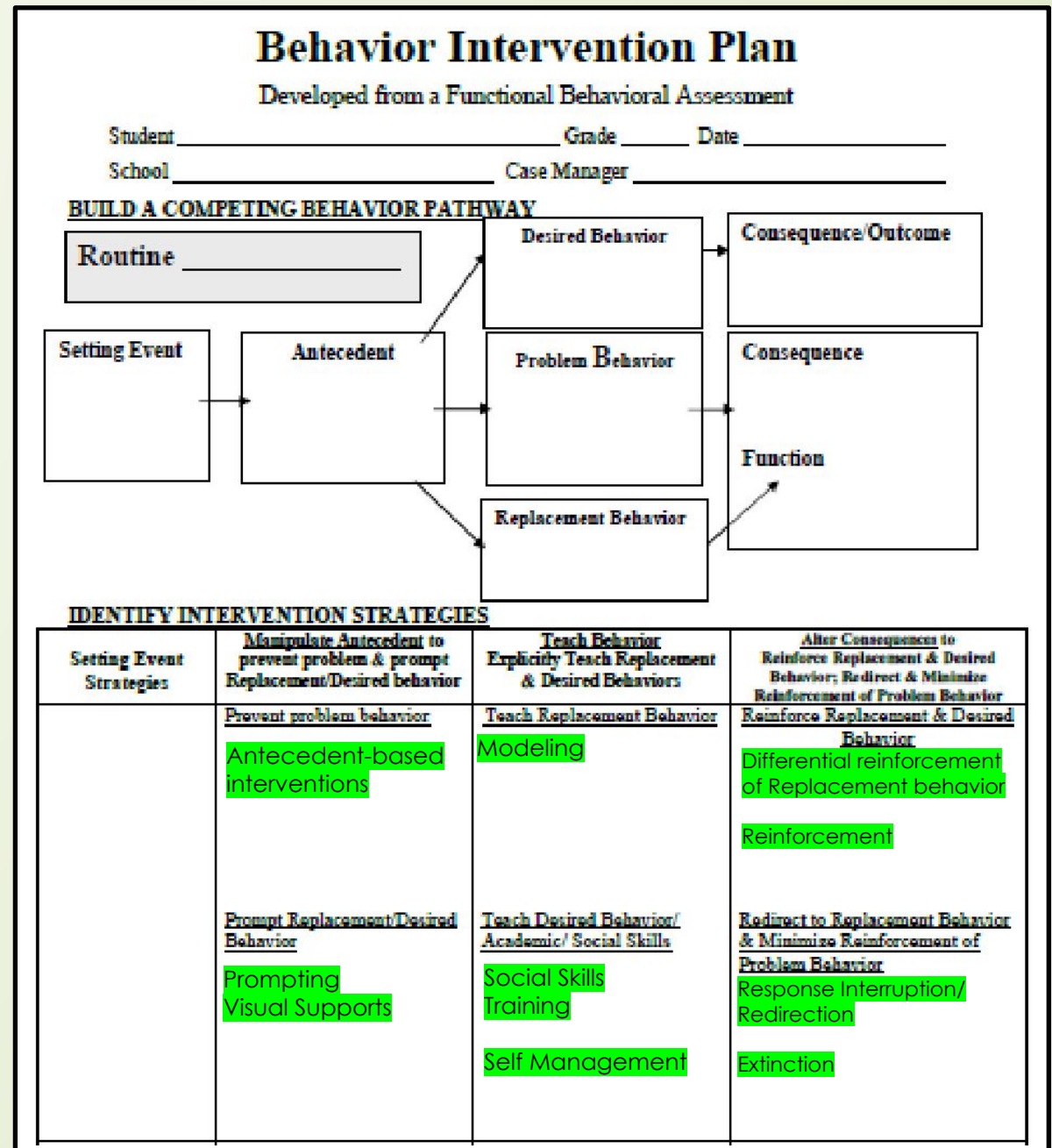


Modules 4 & 5 – Function-Based Intervention

- Training to Identify Function-Based Interventions using information from the FBA
 - Develop a Competing Behavior Pathway w/ a Replacement Behavior
 - Identify interventions to Prevent, Teach, Reinforce & Correct Behavior
 - Identify Successive Approximations to support the student to progress from the Replacement Behavior to the Desired Behavior

Behavior Intervention Plan

- Antecedent-based interventions
- Differential reinforcement of alternative, incompatible or other behavior
- Extinction
- Functional Behavioral Assessment***
- Functional Communication training
- Modeling
- Naturalistic intervention
- Prompting
- Reinforcement
- Response interruption/redirection
- Self Management
- Social skills training
- Visual supports



Module 6 – Implementation Plan

Module 6 Objectives

By the end of this Module you will be able to:

(Click numbers to reveal information)

- 1** Describe the essential components of implementation plans.
- 2** Explain the meaning and importance of “Contextual Fit”.
- 3** Explain the role of the BIP Team Leader and the team members in plan development.
- 4** Identify the specific activities that the team leader will engage in before, during, and after the team-based BIP development process.
- 5** Identify 3 strategies for supporting implementation of Behavior Intervention Plans.

Implementation Plan form

BEHAVIOR SUPPORT IMPLEMENTATION PLAN

Tasks	Person Responsible	By When	Review Date		
			Impl. Rating: 2 = Yes - 90%+ 1 = Needs 50-90% 0 = No - <50%	Evaluation Decision Monitor, Modify, or Discontinue	
<u>Prevent & Prompt:</u> Make problem behavior irrelevant (antecedent intervention)			2	1	0
<u>Teaching:</u> teach Replacement Behavior & skills to engage in Desired Behavior			2	1	0
<u>Reinforcement:</u> Make Replacement & Desired behavior more rewarding than problem behavior			2	1	0
<u>Redirect to Replacement Behavior:</u> Prompt replacement behavior at earliest signs of problem.			2	1	0
<u>Minimize Reinforcement of Problem Behavior:</u> Make problem behavior ineffective			2	1	0
<u>Safety:</u> Is safety a concern? Y N If yes, attach crisis plan to Behavior Support Plan					
<u>Implementation Supports (w/ Who & How)</u> <i>(circle preferred method(s) below or ID another method below)</i>	Person Responsible	When <i>(circle)</i>			
<u>Provide Training to the Implementers:</u> a. Demonstration / with Practice / with Feedback <i>(circle)</i> Other:			2	1	0
<u>Provide Implementation Feedback:</u> b. Complete the Daily Implementation Checklist c. Enter Daily Implementation Data into Graph d. Share Graphed Data with implementers e. Personal check-in / Email / Rating Scale <i>(circle)</i> Other:		Daily 3 x /wk weekly	2	1	0
			Impl. Score	44	44
			Total Possible		

Supporting Implementation



Three primary suggestions for supporting staff to implement the Behavior Intervention Plan



Contextual Fit



Staff Training



Performance Feedback

It's important to consider each to best support staff with implementation. You don't have to be perfect when supporting implementation, but you need to do something.

A little support can go a long way to increase implementation of the BIP.

Module 7 – Evaluation Plan & BIP Review Meeting

Module 7 Objectives

By the end of this Module you will be able to:

(Click numbers to reveal information)

- 1** Use the Competing Behavior Pathway to Develop short-term and long-term behavioral goals for the BIP.
- 2** Develop a daily point card to monitor student progress on the short-term behavioral goal.
- 3** Enter daily point card data into the Basic FBA to BIP graphing template.
- 4** Learn to facilitate a BIP Review meeting.
- 5** Use graphed BIP data to guide decision making related to plan implementation and the effectiveness of the BIP.

Daily Point Card w/ Implementation Checks

Research suggests Daily Self-Monitoring by the *implementer* is an effective and feasible strategy for supporting implementation & collecting implementation data to inform feedback

Front

Student _____ Date _____

Targeted Routine _____ Time _____ to _____

Number of Intervals _____ Interval Length (Total min./# of intervals) _____

Expectations	Routines/Class Period						TOTALS
	1 <time>	2 <time>	3 <time>	4 <time>	5 <time>	6 <time>	
<reducing problem behavior/ increase expected>	2 1 0	2 1 0	2 1 0	2 1 0	2 1 0	2 1 0	/12
<reducing problem behavior/ increase expected/replacement>	2 1 0	2 1 0	2 1 0	2 1 0	2 1 0	2 1 0	/12
<approximation of desired behavior>	2 1 0	2 1 0	2 1 0	2 1 0	2 1 0	2 1 0	/12
TOTALS	/6	/6	/6	/6	/6	/6	/36

2 = Great! No problem. 1 = Needed a reminder 0 = Didn't follow direction

Goal = 80% - 29/36 Total Points = _____/36

Back

Daily Implementation Checklist

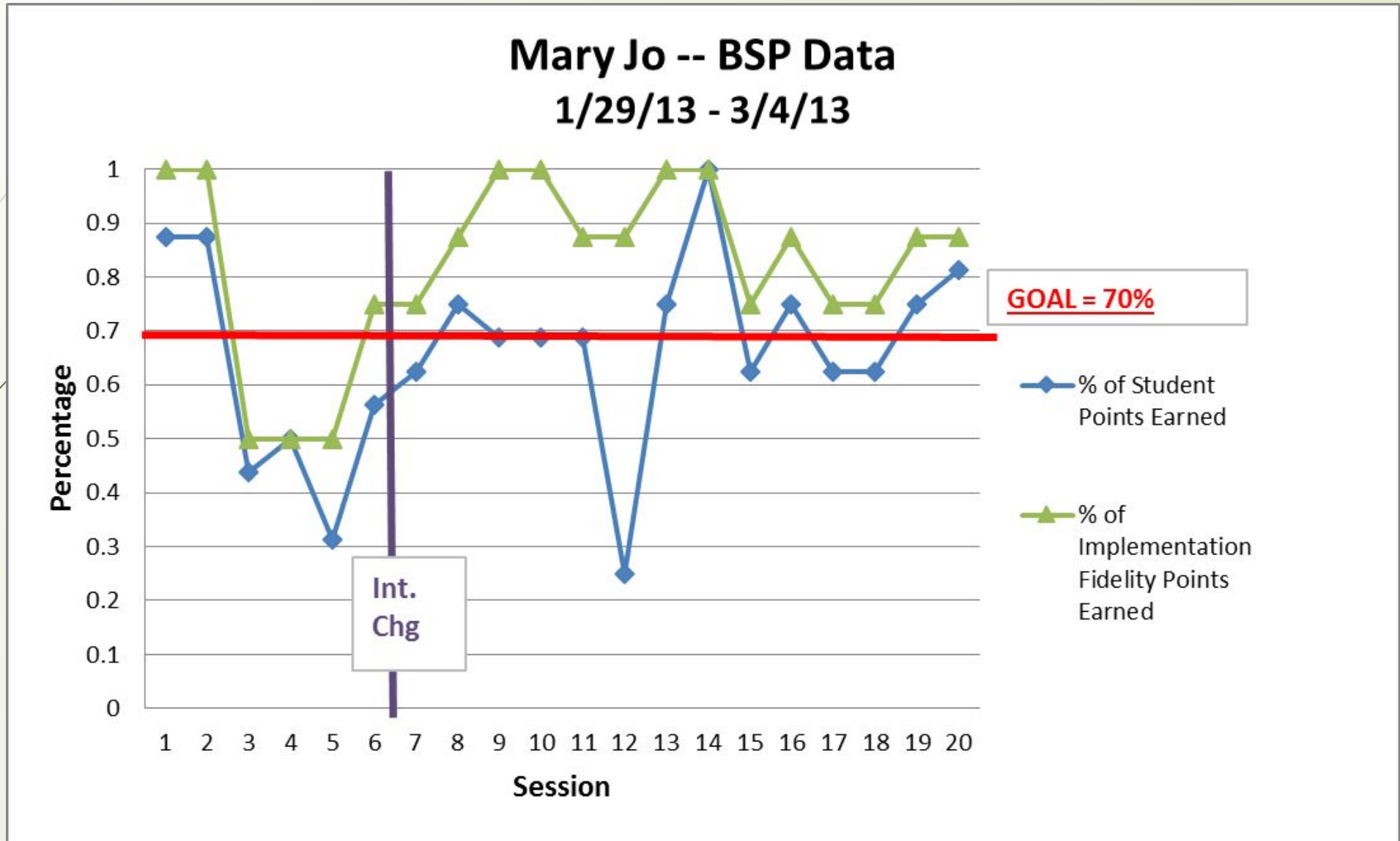
Implementing Staff _____

Interventions Agreed to Implement	Rating
1. Completed point card	2 1 0
2. Provided student with prompt/break	2 1 0
3. Provided appropriate praise to student when alternate/desired behaviors were exhibited by student 4 point scale	2 1 0
NOTES:	Total
	/6

2 = Great! Implemented accurately & on time 1 = Need improvement 0 = Didn't implement

Goal = 100% Implementation - 6/6

Data-Based Decision Making



BIP Review Meeting Form

Behavior Intervention Plan Review Meeting

Student _____ Grade _____ Date _____

School _____ FBA/BIP Case Manager _____

Participants: Behavior Specialist Administrator Implementing Staff Parent

Documents presented for review: Graph for Data Analysis Implementation Plan

AGENDA

1. Review Implementation Fidelity Data, Summarize & Document Decisions/Actions below:
 - a. Review graph with daily Implementation Fidelity ratings
 - b. Review each task on the BIP Implementation Plan form and *complete an Implementation Rating* (2 / 1 / 0) for each task and decide whether to Monitor / Modify / Discontinue.
 - c. Document Actions/Tasks to take in the table below
2. Review Student Progress Data, Summarize & Document Decisions/Actions below:
 - a. Review graphed daily Student Progress data in consideration of the implementation data
 - b. Document Actions/Tasks to take in the table below

DATA SUMMARY

	Summary of the data	Evaluation Decision
Is Plan Being Implemented with Fidelity?	Do we have sufficient data for decision making (at least 80% of data points)? Y N	
	Are tasks being implemented with fidelity (averaging 80% or greater)? Y N	
Is Plan Making a Difference?	Do we have sufficient data for decision making (at least 80% of data points)? Y N	
	Is the student making adequate progress? Y N	

3. Document changes & additions to the original Implementation Plan below

Tasks	Person Responsible	By When	Impl. Rating: 2 = Yes - 90%+ 1 = Data 80-90% 0 = No - <80%	Evaluation Decision Monitor, Modify, or Discontinue
			2 1 0	
			2 1 0	
			2 1 0	
			2 1 0	

Date & Time of the Next BIP Review meeting _____



School-wide Training in Function-Based Thinking



Individualizing Intervention Across the Spectrum (Tier 1 to Tier 3)

Problematic tendencies w/ Behavioral intervention for students with autism:

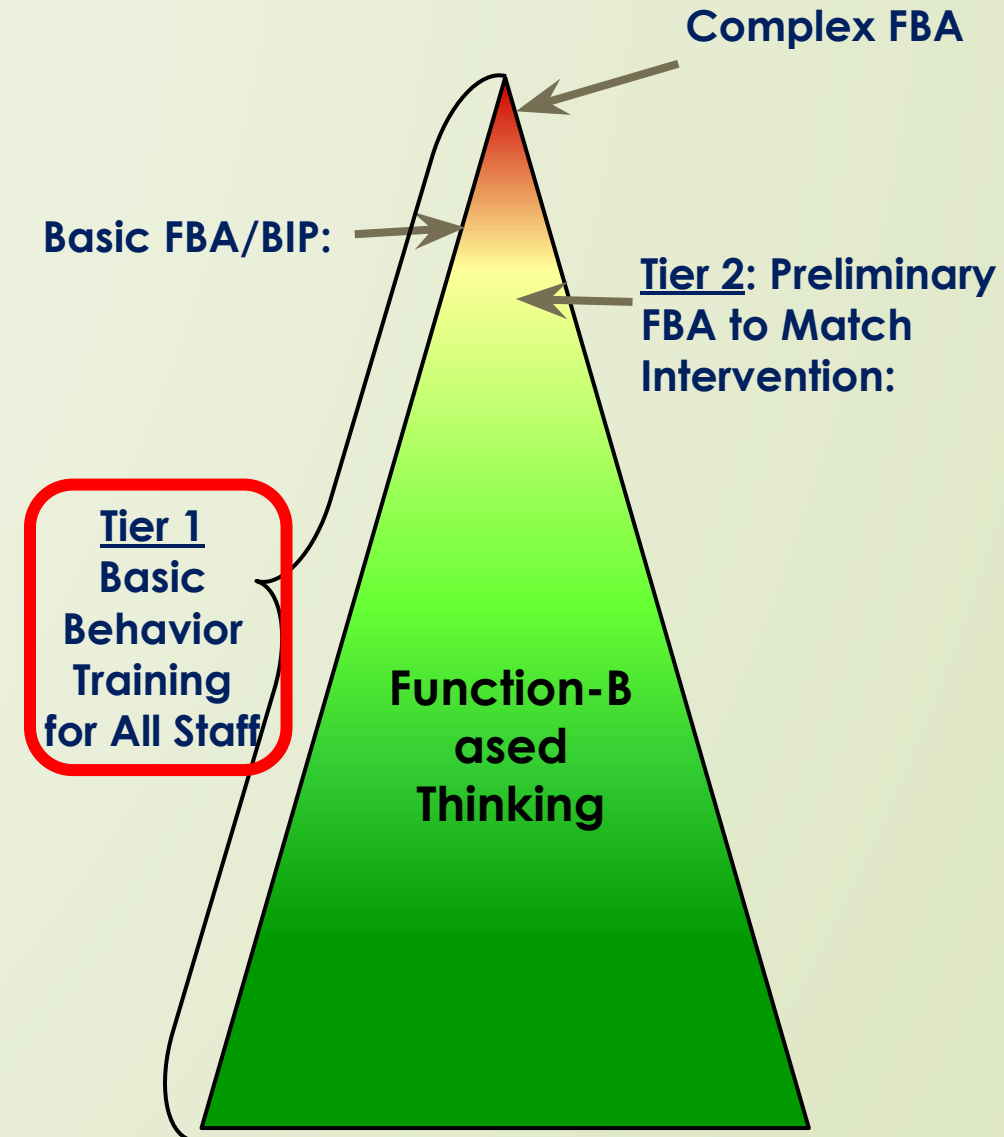
- 1) “You’re only a little autistic” □ All or none autism

What can help?

- Better equip All teachers (Tier 1) in the Basics of Behavior, Function and Individualizing Support

Create a Continuum of Function-Based Assessment & Intervention in your School

- Collecting data to understanding individual needs of student demonstrating initial behavioral challenges
 - Can support individual teacher understanding & decision making
 - Can provide add'l information for Tier 2 decision making



www.BasicFBA.com

Basic FBA to BIP

Welcome! Use the buttons below to take you to the training modules. The Behavior Specialist Training includes all 7 modules and is for those who will be the leading behavior support efforts in the school. The School-wide Training consists of two modules for all staff in the school. The top navigation bar will provide information on how to most effectively use these training resources and don't miss the blog below.

BEHAVIOR SPECIALIST TRAINING

SCHOOL-WIDE TRAINING

Basic FBA to BIP Training Series

Module 1 - Defining & Understanding Behavior

Module 2 - FBA: Practice Interviewing

Module 3 - FBA: Practice Observing

Module 4 - Critical Features of BIP

Module 5 - Building BIP from FBA

Module 6 - Implementation Plan & Leading a BIP team

Module 7 - Evaluation Planning and BIP Review Meeting


**Modules 1 & 4 are to be completed
with all staff in the school**



Module 1 – Basics of Behavior

- Step by Step Training in understanding and identifying the A-B-Cs and Function of Behavior

The A-B-C's of Understanding Behavior



Routine
Where: Place and Time

Antecedent:
(Trigger)
When _____ happens...

Behavior:
The student does (What) _____

Consequence:
...and as a result _____

Function (Why):
Therefore, the function of the behavior is to get/avoid _____

Click on each box to learn more...

Individualizing x Function

Student 1

I am good at making conversation (language). But I get sensory overload in loud and crowded spaces, which then makes conversation very hard for me.



Strengths

Good at Conversation w/ others

Antecedent

Loud and Crowded Spaces



Behavior

Begins talking to self and saying swear words



Consequence

People tend to walk away and moves to quiet space

Function

Escape Loud and Crowded Space causing anxiety

Individualizing x Function

Student 2

I am happy in large crowds, but I find it difficult to stay focused on what people are saying and that trying to keep up with back and forth conversation is overwhelming



Strengths

Enjoys large crowds

Antecedent

Back & Forth Conversation with others (indiv or group)



Behavior

Begins talking to self and saying swear words



Consequence

People tend to walk away and leave student alone

Function

Escape back & forth conversation causing anxiety

ABC Tracker

Teacher completes in Classroom

- Teacher data collection tool for understanding individual triggers, consequences and function of behavior

2

ABC Tracker

Student Brenda Staff Mr. B Dates 10/24 - 11/1/20xx

Identify a student with recurring challenging behavior(s). Focus on a single routine (see p. 1 to prioritize & identify a routine) and track occurrences of the problem behavior during the prioritized school routine (subject or time of day). Track 5 occurrences of the behavior over the next 2 weeks and identify patterns and trends in occurrences to form a Summary Statement below.

Prioritized Routine/ Subject/ Activity (see p. 1) →		Less Structured Time w/ Peers (Morning Play & Recess)	Time of Day:	8:30-8:45 & 10:35-10:50
Date/Time	When... (Antecedent)...happens	The Student.... (Behavior)	And as a result.... (Consequence)	
1 st Incident Date: 10/24 Time: 8:30 Morning Play	Susan calls Brenda a "creep face" and laughs at her	Brenda punches Susan on the arm	Susan stops laughing and walks away	
2 nd Incident Date: 10/26 Time: 10:40 Recess	A group of students at recess call Brenda fat	Brenda kicks several of them	The students run away	
3 rd incident Date: 10/27 Time: 8:45 Transition to Circle Time	A peer laughs at Brenda when she trips on the carpet	Brenda pulls the child's hair	Brenda is sent to the office	
4 th incident Date: 11/1 Time: 10:45 Indoor Recess	Brenda is playing blocks with Ben. Ben takes a block from Brenda	Brenda hits Ben over the head with another block	Ben puts the block down and runs away	

Routine: Unstructured Time/Play

Antecedent/Trigger:
When other students call her names or tease her

Summary Statement

Behavior:
The student punch/kicks/pulls hair/ hits with a toy

Consequence/Outcome:
and as a result the peers go away and leave her alone

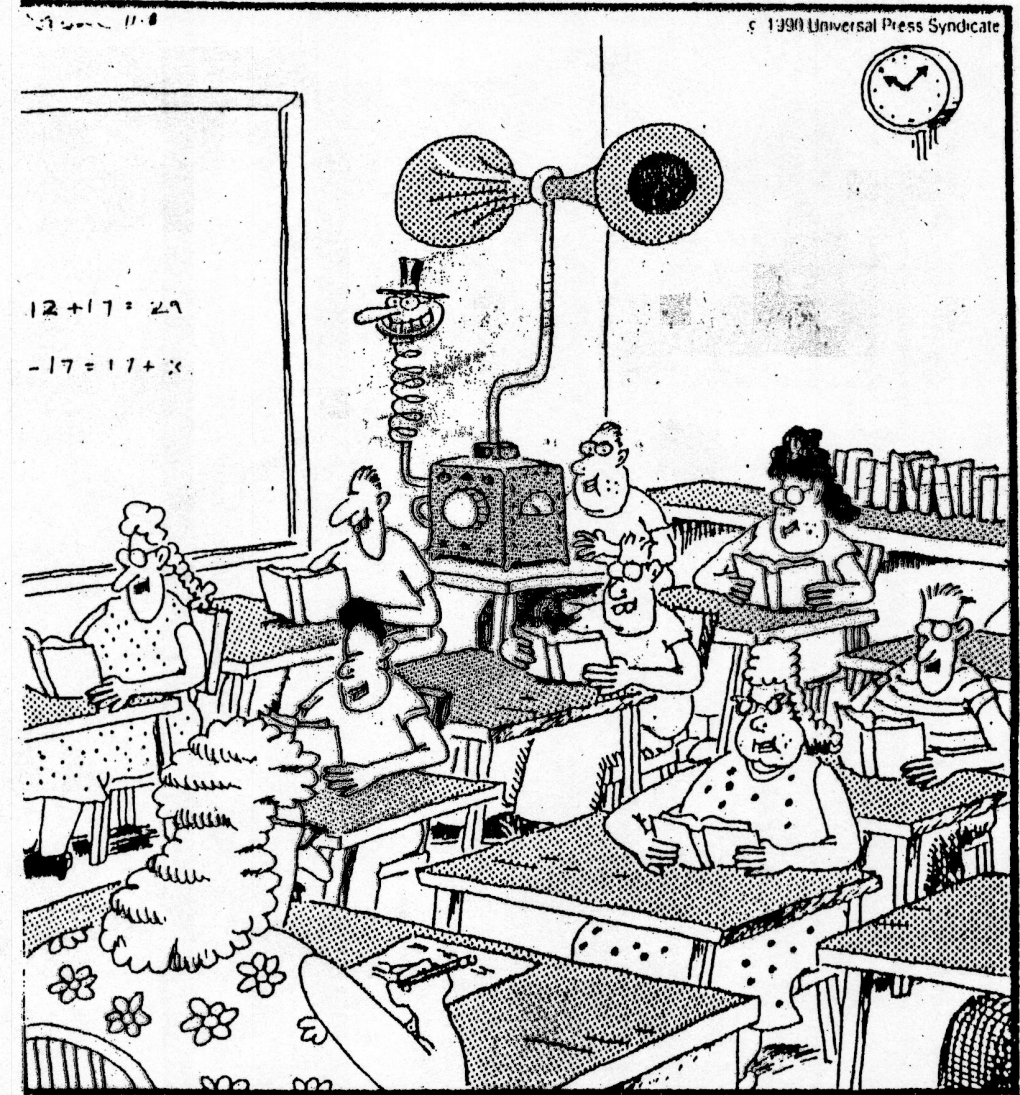
Therefore the function of the behavior is to get avoid peer negative comments/teasing (circle one)

Function-Based Thinking.... On the Fly

Sometimes the function of behavior is crystal clear...

through training we can support staff to identify the obvious triggers & functions?

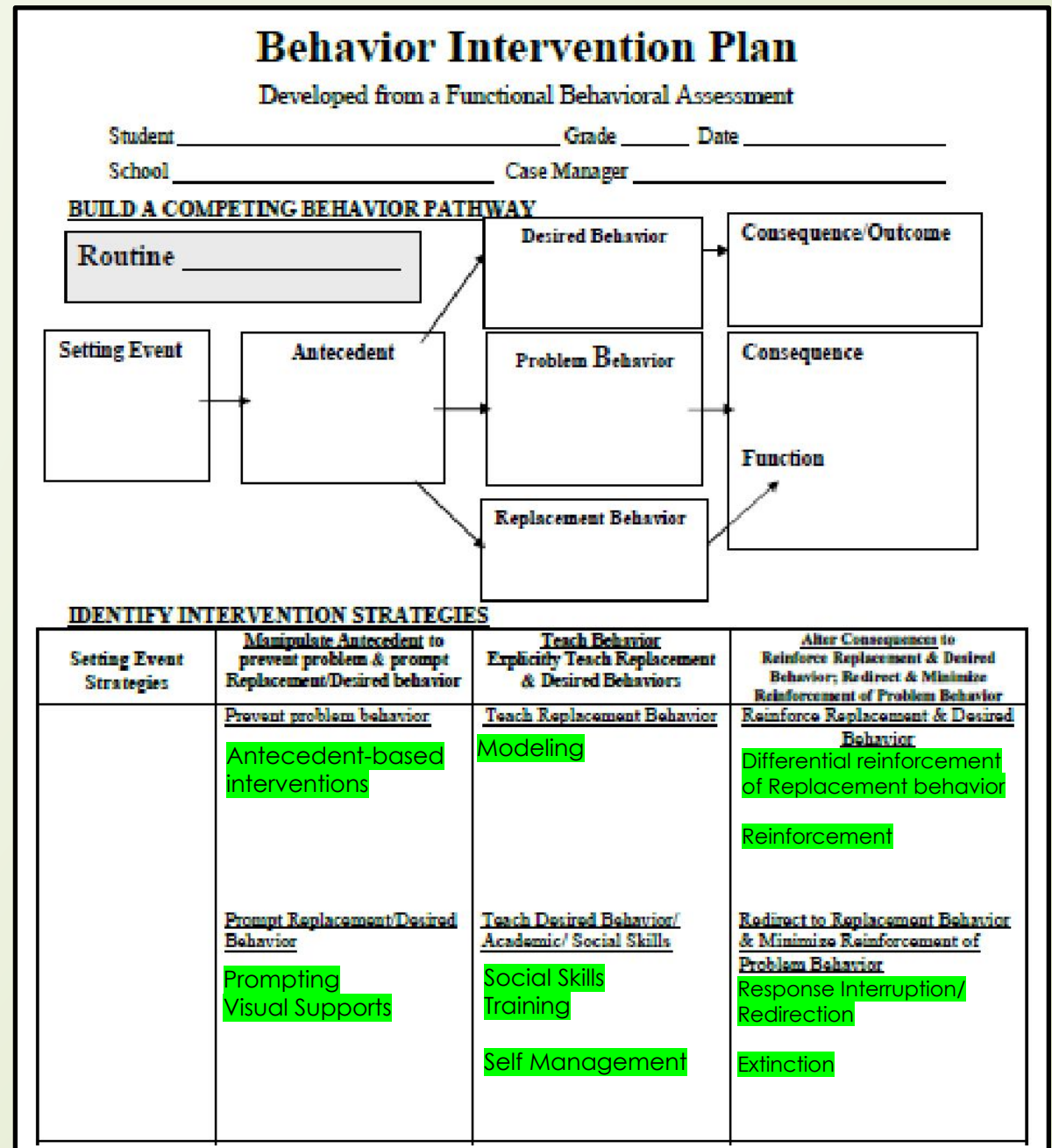
THE FAR SIDE By Gary Larson



The class was quietly doing its lesson when Russell, suffering from problems at home, prepared to employ an attention-getting device.

Module 4: Behavior Intervention Plan

- Antecedent-based interventions
- Differential reinforcement of alternative, incompatible or other behavior
- Extinction
- Functional Behavioral Assessment***
- Functional Communication training
- Modeling
- Naturalistic intervention
- Prompting
- Reinforcement
- Response interruption/redirection
- Self Management
- Social skills training
- Visual supports



Basic FBA to BIP

Planning for Effective Use



School-wide Plan



- District Planning
- School-wide Plan**
- College Courses
- Grad Courses
- Earn BCBA Credit

Basic FBA to BIP

Welcome! Use the buttons below to take you to the training modules. The Behavior Specialist Training includes all 7 modules and is for those who will be the leading behavior support efforts in the school. The School-wide Training consists of two modules for all staff in the school. The top navigation bar will provide information on how to most effectively use these training resources and don't miss the blog below.

BEHAVIOR SPECIALIST TRAINING

SCHOOL-WIDE TRAINING



Thank You!

- All Basic FBA to BIP materials can be found at:
- www.BasicFBA.com
- For more information please email:
chris.borgmeier@pdx.edu
@BasicFBA



References



- Hume, K., Steinbrenner, J. R., Odom, S. L., Morin, K. L., Nowell, S. W., Tomaszewski, B., Szendrey, S., McIntyre, N. S., Yücesoy-Özkan, S., & Savage, M. N. (2021). Evidence-Based Practices for Children, Youth, and Young Adults with Autism: Third Generation Review. *Journal of autism and developmental disorders*, 51(11), 4013–4032. <https://doi.org/10.1007/s10803-020-04844-2>

Standard Operating Procedure

Title: IEP and Evaluation Input forms

Department	Special Education		Version No.	PDLCS-	
Prepared by:	Mary Alicandro	Date:06/22/2022		Supersedes:	
Approved by:		Date:		Date Issued:	

Document Owner:

Affected Parties: Special Education Teachers, Regular Education Teachers, Special Education Records Specialist, Related Service Providers

Purpose: This procedure will provide information on sending out the IEP and Evaluation Input forms.

Data Needed: IEP and Evaluation Input forms,

Resources Needed: IEP writer, SIS, and Student Services “Y” drive for testing scores

Guidelines and/or Procedures:

FOR IEP INPUT FORMS:

- 1. Two weeks prior to when a student has been scheduled for an IEP meeting the Special Education Records Specialist will send an email with the appropriate forms attached to the student’s regular education teachers, counselor, elective teacher, MTSS teacher, and related services provider(s). The email will state: To All: Student Name is scheduled for an IEP meeting. Please fill out the appropriate form and return it to me by Date. Reply to this email with your form attached. All forms must be in Word format. Please name your file as follows: Student Last Name, First Name, Subject, Your Name. Thank you.**
- 2. In most cases, one week will be given for the forms to be completed and returned. There may be an occasion when there is an emergency need for information and forms will be asked to be completed immediately.**
- 3. The Special Education Records Specialist will check periodically to see who has sent a form in and who has not. A reminder email will be sent only to those who have not sent in a form. The forms are saved to the (S) special education drive in the folder named: Current School Year, IEP_Eval_Reeval Form, by student name.**
- 4. One week prior to the IEP meeting, all forms that were sent for the student are sent to the student’s special education teacher.**

FOR EVALUATION/REEVALUATION/RECORD REVIEW FORMS:

- 5. Three weeks prior to when a student has been scheduled for an Evaluation, Reevaluation or Record Review, the Special Education Records Specialist will send an email with the appropriate forms attached to the student’s special education teacher, regular education teachers, elective teacher, counselor, MTSS teacher, and related services provider(s). The email will state: To All: Student**

Name is scheduled for an Evaluation/Reevaluation/Record Review meeting. Please fill out the appropriate form and return it to me by Date. Reply to this email with your form attached. All forms must be in Word format. Please name your file as follows: Student Last Name, First Name, Subject, Your Name. Thank you.

- 6. In most cases, one week will be given for the forms to be completed and returned. There may be an occasion when there is an emergency need for information and forms will be asked to be completed immediately.**
- 7. The Special Education Records Specialist will check periodically to see who has sent a form in and who has not. A reminder email will be sent only to those who have not sent in a form. The forms are saved to the (S) special education drive in the folder named: Current School Year, IEP_Eval_Reeval Form, by student name**
- 8. The Special Education Records Specialist will complete a Student Data form for the student and check on the Y drive, Student Records, Student Records Do Not Delete file to see if any current testing scores are in the folder for the student. If test scores exist, copy and save the files to the student's file on the S drive, Special Education, Current School Year, IEP_Eval_Reeval Form, by student name.**
- 9. At least one week prior to the due date of the report the Special Education Records Specialist will send an email to the school psychologist with all of the forms and test scores attached.**



NEW Updates & Overview of Ind 13 Initiative

2022-2023

Preparing for Cyclical Monitoring:
A Focus on Secondary Transition

What's NEW?

As a result of the COVID 19 Pandemic, PATTAN & BSE created an online course that contains all of the traditional professional development!

2022-2023 PENN LINK

Preparing for Cyclical Monitoring: IND 13

NEXT STEPS:

- Develop an administrative team to support the targeted training and technical assistance process
- Register and attend required PATTAN webinar September 15, 2022
- With AIU TaC (Dr. Grimm)
 - Develop and implement a department training plan for 2022-2023
 - Complete interview and effective practice survey
 - Identify targeted staff to complete the Schoology course requirement
 - Identify targeted special education professionals to submit PRE & POST IEPs for review & participate in coaching/consultation sessions

SCHOOLGY COURSE:

- Course will provide 6 ACT 48 hours
 - Course Closes February 28, 2023
- ALL required staff must register for the course on the PATTAN website!
 - **REGISTRATION KEY: IND13-2022**
- Identify best process to take course
 - *One Day*
 - *Designated Days*
 - *Identify a District Deadline*

CONTACT: CECIL CROUCH
@ PATTAN FOR
QUESTIONS.
CCROUCH@PATTAN.NET

2022-2023 INDICATOR 13 INITIATIVE



01

**SCHOOLGY
COURSE**




02

**COACHING &
CONSULTATION**



03

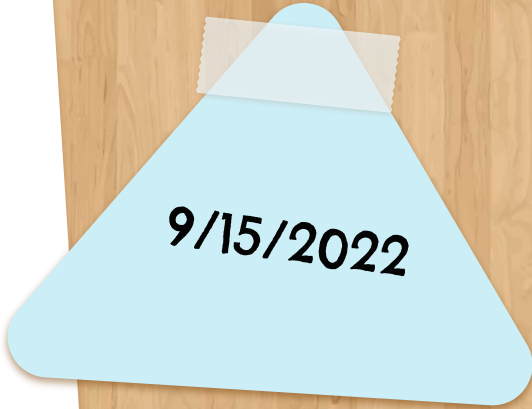
**TRAINING PLAN
& NEXT STEPS**



**What LEAs Need to
Know About The
Secondary Transition
Cyclical Monitoring
Schoology Course**

REGISTRATION LINK:

<https://www.pattan.net/Events/Webinar/Course-2919/Events/Session-36778>



9/15/2022

**SAVE
THE
DATE**

EBR

**Educational Benefit Review:
Preparing for Cyclical Monitoring**

Winter OR Spring Session

EDUCATIONAL BENEFIT REVIEW

- **EBR will be part of your audit process in 2023-2024**
- **Attending Winter 22' or Spring 23'**
- **Why are we suggesting this:**
 - Help prepare department professionals for the 2023-2024 audit & EBR....EARLY!
 - Help special education teachers to utilize the EBR process throughout the 2022-2023 school year
 - Paying special attention to EBR, Compliance, Individualization, and IND 13 Best Practices
 - Support LEAs or designated department leaders to utilize coaching/mentoring skills to better assist special education teachers to enhance their composition, attention to compliance, and educational benefit for students annually

2022-2023 EBR WINTER & SPRING SESSION DATES

NOVEMBER

Thursday November 17, 2022

IN PERSON!

AIU, Montessori Room

8:30a-3:30p

MARCH

Thursday March 9, 2023

IN PERSON!

AIU, Montessori Room

8:30a-3:30p

REGISTRATION LINK will be coming soon!

THANKS!

Do you have any questions?



Indicator 13 & EBR Series

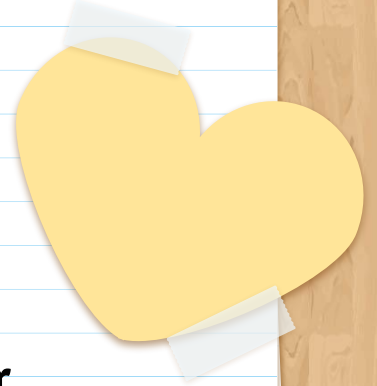
Dr. Erin Grimm

erin.grimm@aiu3.net

EBR Series

Dr. Kendra Bittner

kendra.bittner@aiu3.net



See you on the webinar!

September 15, 2022

9:00a-11:00a

From: [Erin Grimm](#)
To: [Stephanie Faith](#)
Cc: [Hillary Mangis](#)
Subject: PA DISTANCE CS Schoology Roster Confirmation
Date: Wednesday, October 19, 2022 10:50:28 AM
Importance: High

Hello Stephanie,

I hope you are having a great day.

Please look at the screen shot of your district's professional roster for the PCM IND 13 initiative. Based on the list of professionals below, are they all completing the Schoology course? If not, could you please let me know which individuals are taking the course so Dr. (Hillary) Mangis of PaTAN and I can provide support during their course completion. Thank you.

Name/ Role	Name/ Role	Name/ Role
Name: Sarah Blöse Role: Special Ed	Name: Madison Corcoran Role: Special Ed	Name: Angie Grossman Role: Special Ed
Name: Daniela Zanone Role: Special Ed	Name: Valerie Metz Role: Special Ed	Name: Sara Otzewski Role: Special Ed
Name: Karen Clutter Role: Special Ed	Name: Stacy Martin Role: Special Ed	Name: Melissa Glancy Role: Special Ed
Name: Matt Galando Role: Special Ed	Name: Amy Dunn Role: Special Ed	Name: Lisa Wierdak Role: Special Ed
Name: Felicia Batrack Role: Special Ed	Name: Brina Reddedcliff Role: Special Ed	Name: Jamie Bate Role: SLP, Related Service
Name: Aubry Hoffman Role: OT, Related Service	Name: Joanna Bigos Role: Beh. Specialist	Name: Role:
Other staff who will attend trainings: Guidance, school psychologists, building administrators, social workers, etc.		
Add Row		
Name: Stephanie Faith Role: SE Coordinator	Name: Charlie Mort Role: HS Principal	Name: Kelly Crooks Role: CAO
Name: Laura Budé Role: CEW Coordinator	Name: Kim Crandall Role: MS Principal	Name: Role:

Sincerely,

Erin Grimm, Ed.D
 Training and Consultation Coordinator
 ALLEGHENY INTERMEDIATE UNIT

475 East Waterfront Drive
 Homestead, PA 15120
 412-394-4952 office
 412-657-9570 mobile
erin.grimm@alu3.net

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IEP Transition Services



Training Agenda

- **Review Transition Sections of the IEP:**
 - IEP Section II-Present Levels
 - Academic Achievement
 - Functional Performance
 - Postsecondary Transition Goals (Includes Agency Involvement)
 - IEP Section III-Transition Services
 - Act 26 Questions
 - Post Secondary Goal Area
 - Employment Goal Area
 - Independent Living Goal Area
- **View Available Transition Resources**
- **Review Required Surveys/Assessments**
- **Complete Practice Activity**



Transition Sections of the IEP

Present Levels of Academic Achievement

- Initial Transition Blurb

Functional Performance

- Strengths and weaknesses as they relate to executive functioning skills

Present Levels Related to Current Postsecondary Transition Goals

- Historical Narrative from One Year Prior
- Three Goal Areas Clearly Shown (Headings for Each)
- Survey and Assessment Data Shown and Summarized for Each Goal Area
- Agency Involvement Listed or Explained for Non Involvement (3 I's for Agencies)
- Parental Concerns Included in Parental Concerns Section of PL (Page 2)

Transition Services

- Act 26 Questions
- Transition Grid Items (Goals, Services, Activities, Courses)

1

Section II-Present Levels



Present Levels of Academic Achievement

Section II PAGE 1

Page 1-Transition Blurb

- Insert a blurb that highlights the students transition goals prior to entering present levels of academic achievement data. Include the Career Pathway the student is interested in.

Example Transition Blurb:

_____ is in year two of receiving transition services. _____ has expressed an interest in attending college after graduation to earn a degree in **Education**. The student also expressed an interest in wanting to maintain competitive employment working with children; as well as the desire to live independently without financial supports.

- ★ *This information is from the student's perspective.*

[Indicator 13 Checklist](#)



Functional Performance

Section II PAGE 1

Page 1: Functional Performance Blurb

- This section should provide insight into who the youth is as a student, and member of their community etc. There should be discussion on documenting their strengths and weaknesses as it relates to Executive Function Skills and how these skills may impact their academic performance, social/emotional development, and skills essential for a good life after graduation.

Example from Cyclical Monitoring:

- ★ Alison has made improvements in her self-awareness and self-advocacy skills over the past few years. Alison reports to her teachers about disability and accommodation needs at the beginning of each semester. Alison needs to continue to improve her self-determination skills (**AIR Self Determination Assessment-1/15/2023**).



Present Levels Related to Current Postsecondary Transition Goals

Section II PAGE 2 (Surveys/Assessments & Agency Involvement)

Page 2

- **1ST:** Begin with a Historical Narrative from One year Prior (*what have they accomplished, what skills have they gained, what experiences have they participated*). If they will just be entering transition age, speak to that; share what this pathway means for the student now and into the future.
- **2ND:** Enter the students 3 goals (clear headings for each: Postsecondary, Employment, Independent Living).
- **3RD:** Under each goal area, enter student survey/assessment data as it relates to the students 3 goal areas.
 - Include academic and non-academic strengths and needs in each area. What has the student achieved, what attributes do they have, what do they still require or need to develop toward their post secondary goals?

Click [HERE](#) for a detailed example (includes Agency Information)!

Required Surveys/Assessments

- Click [HERE](#) to view the required surveys/assessments by grade level.
 - Student Transition Survey (14+)
 - [Parent/Guardian Transition Survey](#) (*Any Transition Related Concerns List Under Parental Concerns-PL Page 3*)
 - Photo Career Quiz: K-5 / My Next Move (O*Net): 6-8 / Career Clusters: 9-12

*Please Note: Additional assessments other than the ones shown above that are more individualized to a students' needs in any of the 3 goal areas may be needed to determine appropriate goals (Ex: independent living).





Present Levels Related to Current Postsecondary Transition Goals

**Section II PAGE 2 (Agency Involvement)

Agency Involvement:

Add a heading titled "Agency Involvement" underneath all of the students goal area survey/assessment information and parent transition survey information (This should be shown last on page 2 for present level related to postsecondary transition goals).

*Address the 3 I's for Agencies: How they were Invited? How they will be Involved? and How will the student and family be Informed about agencies/ services in their community?

- Agency Invite If
 1. The agency will provide or pay for transition services and the Parent/Guardian agrees to services.
 - If an agency is not invited for a transition aged student, you must document why it is not being pursued at this time in this section (PL Page 2). Ex: Parent Refusal
- IEP Invitation for Agency Involvement
 1. Check Transition Planning Box
 2. Check Transition Services Box
 - a. Under Transition Services Box list agency to be considered by the parent/guardian to attend (i.e., Office of Vocational Rehabilitation, Office of Behavioral Support, Office of Developmental Programs, etc)
 3. Within the Team Members Section, list the agency under Role (Ex: OVR)
 4. Within the Team Members Section, list the reps name under Name (Ex: _____ County OVR Rep)
 5. Add the reps email information so that they receive a request to sign electronically if they attend the meeting and so they show on the signature page.

[Agency Examples](#)

IEP Meeting Invitation

Indicator 13 Checklist:
Items 1 & 2
File Review Questions:
245, 246, 247, 264, 268, 269,
& 270

INVITATION TO PARTICIPATE IN THE IEP TEAM MEETING OR OTHER MEETING

Child's Name: _____

INVITATION TO PARTICIPATE IN THE INDIVIDUALIZED EDUCATION PROGRAM (IEP) TEAM MEETING OR OTHER MEETING School Age

Child's Name: _____
Date Sent (mm/dd/yy): _____
Name and Address of Parent/Guardian/Surrogate: _____

For LEA Use Only:
Date of Receipt of Parental Response to Invitation

Dear _____,

We would like to invite you to an IEP team meeting to talk about special education program and services for your child.

The purpose of this meeting is to: (Check all that apply)

Develop an IEP, if your child is eligible, or continues to be eligible, for special education and related services.

Discuss possible changes in your child's current IEP and revise it as needed.

Transition Planning. If your child will be at least 14 years old during the duration of this IEP, the IEP team will develop postsecondary goals based on transition assessments and transition services to promote movement from school to post school activities. Your child is invited by the school to attend this meeting and is included in the list of invited IEP team members listed below.

Transition Services. If necessary, and with your consent, staff from other public agencies that may be providing or paying for transition services will be invited to IEP team meeting. We are inviting representative(s) from the agency or agencies as listed:

Other _____

IEP Team Meeting - Invited IEP Team Members

As the parent, you are a member of your child's IEP team, and we, the Local Education Agency (LEA) want you to attend the IEP team meeting. Listed below are the other team members, including your child, if 14 years or older, that we are inviting. In addition, you may bring other people to the IEP team meeting who have knowledge or expertise regarding your child. If you have any questions or comments about this, please contact the LEA as soon as possible.

Role	Name	Role	Name
LEA Representative		Community Agency Rep. ^{***}	
Special Ed. Teacher		Career/Tech Ed. Rep. ^{***}	
Regular Ed. Teacher		Other	
Child [†]			
Teacher of the Gifted ^{**}			

* As required by federal and state regulations, the LEA invites your son/daughter to attend the IEP meeting when transition services and postsecondary goals will be considered. Transition services and postsecondary goals may be considered at any age, but must be included in the first IEP to be in effect when your child reaches age 14.

1

Section III-Transition Services



Act 26 Questions



Act 26 Questions:

- IEP Writer now shows the following required questions:
1. Does this student have a transition plan as part of the IEP?
 - All students should have this! --Answer YES
 2. Does the student have an outcome goal of competitive integrated employment?
 - This should be listed in the employment goal. --In almost all cases this is a YES
 3. Did the student participate in a competitive integrated paid work experience?
 - Our WBLE Program counts for this (11th & 12th Grade Students Only)
 4. Did the student participate in individual job coaching services funded by the school in a paid work experience?
 - This Includes Only Contracted Services (OVR, Family Links, etc.)
 5. **Upon exiting high school**, was the student employed in a competitive integrated setting?
 - Parties Responsible for this question: Counselors, 12th Gr Sp Ed Teacher, HS Principal
 - i. This question is not shown in IEP Writer.



Postsecondary Goals



Postsecondary Goals:

Postsecondary goals must be measurable and identify specific outcomes that will occur after high school within the 3 areas. **Goals are created based on assessment data that is shown in the present ed section of the IEP and must be updated annually.**

All post secondary areas must have at least 1 Measurable Annual Goal listed as a service in the grid.

ALL measurable annual goals must be referenced at least once on the transition grid. (i.e., if you have 5 MAGs all 5 MAGs must be referenced at least once)

- Don't forget to include related service MAGs (i.e., speech/language, OT, PT)

At least one service and one activity to assist the student in meeting their goals should be developed for each of the 3 postsecondary goal areas and shown in the grid (it is recommended to have at least two activities for each goal area).

Goal Formula:



Services and Activities



**At least one service and one activity must be included in the Grid for each of the 3 goal areas (2 activities is preferred)*

Services (Align with MAG):

- Aligns with measurable annual goals (MAGs) and need listed at the end of the Present Ed Levels.
- **Services in the GRID: Look at the goal and write down the skill being focused on as the service in the transition grid (Examples on [Slides 14-17](#))**
- Are instructional and related services skills the student needs to attain their postsecondary endeavors.
 - Ex of Instructional Services: Teaching, Academics, Work-Related Skills, Community Skills, Self-Determination Skills
 - Ex of Related Services: Transportation, Occupational Therapy, Physical Therapy, Job Coach

Activities (Assist Student in Meeting Goals):

- Are unique to the student and their needs and can include things the student is doing in the general education setting (Ex: Resume and Cover Letter Activity). Should focus on the student's future endeavors (skill, experience, opportunity, knowledge building)
 - Example Activities:
 - Community Experiences: Work-Based Learning, Daily Living, Visits to Local Colleges
 - Employment & Post-School Adult Living Objectives: Financial Planning, Health Care, Self-Advocacy, Self-Determination
 - Daily Living Skills: Learning to Drive, Banking, Healthcare, Self-Sufficiency
 - Functional Vocational Evaluation: Formalized Employment Assessment

TRANSITION SERVICE ALIGNMENT IN THE IEP

*Use will instead of goal if possible when goal writing.

Academic, developmental, and functional needs related to student's disability

The following skills were identified as instructional needs for Sophie:

- ❖ Algebraic calculation (solving for the unknown)
- ❖ Application of writing conventions

Post Secondary Education & Training Goal: Sophie as a goal to attend a vocational program to become a certified cosmetologist with a focus on hair extensions.

Measurable Goal
YES / NO

Courses of Study: Algebra 1, Biology, English 10, American History, CTE USA Hair Styling, CTE USA Styling, Shaping & Coloring

Service/Activity	Location	Frequency	Projected Beginning Date	Anticipated Duration	Person(s) Agency Responsibility
*Improve application of writing conventions	Classroom courses	Written responses throughout instructional day	3/10/2023	3/9/2024	LEA, student, CTE Professionals; general & special ed professionals
Explore 2/3 continued certification programs of interest identifying pro/con list for each	CTE USA or Guidance Office	4 times throughout the year	3/10/2023	3/9/2024	LEA, student, CTE professionals; guidance, TC, agency provider

MEASURABLE ANNUAL GOAL

Include: Condition, Name, Behavior, and Criteria (refer to annotated IEP for description of these components.)

Given an open-ended question, Sophie will compose a 3-5 sentence response; applying the correct conventions of writing; improving her baseline from 75% to 100% on 4 of 5 weekly prompt reviews.

IT IS ESSENTIAL TO ALIGN THE SKILL TO THE PELS OF ACADEMIC ACHIEVEMENT VIA INTERPRETED DATA /EVIDENCE

1

Section III Transition Services GRID

Postsecondary Education and Training Goal(s)

Postsecondary Education and Training Goal(s): Upon completion of high school, Super Student will attend a four-year college to earn a degree in education.					Measurable Annual Goal <input checked="" type="radio"/> Yes/ <input type="radio"/> No (Document in Section V)
Courses of Study: List courses the student is currently taking or will be taking while this IEP is implemented.					
Service/Activity	Location	Frequency	Projected Beginning Date	Anticipated Duration	Person(s)/ Agency Responsible
<i>2 Activities Recommended</i>					
*Improve Reciprocal Conversation	Classes and Resource Room	Daily, per school calendar	10/3/2021	10/3/2022	LEA, SpEd Teacher/Gen Ed Teachers, School Counselor
Camus Tour (Includes Disability Services Information)	WCCC Campus	Once during Spring Semester 21/22 SY	1/3/2022	6/3/2022	LEA, SpEd Teacher, School Counselor, WCCC Rep

Note: Courses the student takes should align with their pathway and assist them in reaching their post secondary goals.
*Include any transition surveys, career assessments, and additional assessments as an activity where applicable.
Reference [Transition Grid Guide](#)*

Employment Goal(s)

Employment Goal(s): After graduation, Super Student will obtain full-time employment working with children in a school setting.					Measurable Annual Goal <input checked="" type="radio"/> Yes/ <input type="radio"/> No (Document in Section V)
Courses of Study: List courses the student is currently taking or will be taking while this IEP is implemented.					
Service/Activity	Location	Frequency	Projected Beginning Date	Anticipated Duration	Person(s)/ Agency Responsible
<i>2 Activities Recommended</i>					
*Improve Reciprocal Conversation	Classes and Resource Room	Daily, per school calendar	10/3/2021	10/3/2022	LEA, SpEd Teacher/Gen Ed Teachers, School Counselor
Work-Based Learning	Daycare in Allegheny County	Spring Sem-21/22 SY	1/3/2022	6/3/2022	LEA, SpEd Teacher, School Counselor, Employer

Note: Courses the student takes should align with their pathway and assist them in reaching their post secondary goals.
*Include any transition surveys, career assessments, and additional assessments as an activity where applicable.
Reference [Transition Grid Guide](#)*

Independent Living Goal(s)

NOTE: If a goal section is not a targeted goal area, the documentation in the postsecondary goal space should indicate, "_____" and their IEP team have determined that an Independent Living Goal is not needed at this time. The rest of the grid is left blank and evidence must be documented within the PELs of Post Secondary Transition as to why.

Independent Living Goal(s), if appropriate: Upon completion of high school, Super Student will self-advocate to identify accommodations needed to be successful in college.					Measurable Annual Goal <input checked="" type="radio"/> Yes/ <input type="radio"/> No (Document in Section V)
Courses of Study: List courses the student is currently taking or will be taking while this IEP is implemented.					
Service/Activity	Location	Frequency	Projected Beginning Date	Anticipated Duration	Person(s)/ Agency Responsible
<i>2 Activities Recommended</i>					
*Improve Reciprocal Conversation	Classes and Resource Room	Daily, per school calendar	10/3/2021	10/3/2022	LEA, SpEd Teacher/Gen Ed Teachers, School Counselor
Self-Advocacy Prep	1-1/ Resource Room	Once in Fall Sem-'21-'22 SY	10/3/2021	1/3/2022	LEA, SpEd Teacher, School Counselor, OVR

Note: Courses the student takes should align with their pathway and assist them in reaching their post secondary goals.
*Include any transition surveys, career assessments, and additional assessments as an activity where applicable.
Reference [Transition Grid Guide](#)*



Indicator 13 Checklist Questions



Indicator 13 Checklist Questions for the Transition Grid (Qs 4-7)

- Use the following questions to ensure you remain compliant within the Transition Grid section of the IEP (repeat questions for each of the 3 postsecondary goal areas):
4. Is there an appropriate measurable postsecondary goal or goals in this area?
 - a. Goals are created based on assessments completed by the students.
 5. Are postsecondary goals updated annually?
 - b. **A summary of the postsecondary goals should be referenced in the Present Levels section of the IEP. It should be noted that based on current assessments goals remain the same, or goals will be changed and explain the reason why. [Reference PL Pg 2 Example](#)**
 6. Are there transition services and activities in the IEP that will reasonably enable the student to meet his or her postsecondary goals?
 - c. Aligns directly with the goal
 7. Do the transition services and activities include courses of study that will reasonably enable the student to meet his or her postsecondary goal(s)?
 - d. Courses do not show as elective and are specific to the students interests

1

RESOURCES



Transition Discoveries



What Is Transition Discoveries?

- A [website](#) that developed tools and experiences to ensure that all young people with disabilities and their families are empowered to take leadership roles in transition planning for life after high school (written in student language).

How Can You Use It With Your Students?

- Use the [TD Guide](#) to have conversations with families before and during transition planning meetings. You can also use the guide to develop [lessons and activities](#) to build on students' transition skills (Resources Include Tip Sheets for Students and Videos)
- Use the [TD Teacher Resource Guide](#) to support how you integrate transition planning into general coursework. There are lessons based on different content areas. Share information with Gen Ed teachers to promote collaboration!



Additional Resources

PaTTAN

[Annotated IEP](#)

[Indicator 13 Checklist](#) (From Cyclical Monitoring Training)

[Indicator 13 Modules and Best Practices](#)

[Indicator 13 Examples](#)

PA Distance Resources

[Transition Folder](#)

[Transition Planning Brochure](#)

[Transition Padlets](#)

[OVR Liaison](#)

[IEP Transition Grid Examples](#)

[PDLCS IEP Checklist**](#)

[OVR Training](#)

[*Required Surveys/Assessments*](#)

Additional Sites/Links

[Secondary Transition](#)

[Transition FAQs](#)

[PDE Planning for the Future Checklist](#)

1

Practice Activity



Transition Grid Practice Activity

New Staff Only**

- Think about a student you have worked with in the past. What were their strengths, weaknesses, and interests? What post secondary goals, employment goals, and independent living goals did they have?

Complete the [Transition Grid Practice Document](#) for this student! If you can't remember a specific student, make one up!

- You must make a copy of the document in order to complete it.

Please submit your completed assignment within [Schoology](#)



Transition Services Refresher Activity

Returning Staff Only**

- Complete the **IEP Transition Services Training Google Form**.

Please submit your completed assignment within [Schoology](#)





Thank You!

[Verification of Completion Form](#)

Please don't hesitate to reach out!

- laura.budd@padistance.org
- Phone Ext 209

Timestamp	Email Address	I verify that I attended the live training and also completed the follow up activity.
8/30/2022 8:59:48	joanna.bigos@padistance	Yes, I verify that I completed all parts of this training.
8/30/2022 9:00:31	brina.reddecliff@padistan	Yes, I verify that I completed all parts of this training.
8/30/2022 9:02:07	amy.dunn@padistance.or	Yes, I verify that I completed all parts of this training.
8/30/2022 9:02:48	kerianne.mulvey@padista	Yes, I verify that I completed all parts of this training.
8/30/2022 9:09:17	sarah.blose@padistance.	Yes, I verify that I completed all parts of this training.
8/30/2022 9:31:55	brianna.smith@padistanc	Yes, I verify that I completed all parts of this training.
8/30/2022 10:42:44	ashley.levenson@padista	Yes, I verify that I completed all parts of this training.
8/30/2022 10:49:33	jamie.bate@padistance.o	Yes, I verify that I completed all parts of this training.
9/6/2022 17:07:30	sara.olszewski@padistan	Yes, I verify that I completed all parts of this training.
9/13/2022 12:26:29	valerie.metz@padistance	Yes, I verify that I completed all parts of this training.
9/13/2022 14:53:17	matthew.galando@padist	Yes, I verify that I completed all parts of this training.
9/13/2022 15:04:25	amy.dunn@padistance.or	Yes, I verify that I completed all parts of this training.
9/14/2022 9:20:06	madison.corcoran@padis	Yes, I verify that I completed all parts of this training.
9/14/2022 13:45:23	melissa.glancy@padistan	Yes, I verify that I completed all parts of this training.
9/14/2022 13:48:03	lisa.wierdak@padistance.	Yes, I verify that I completed all parts of this training.
9/14/2022 23:39:21	daniella.zenone@padista	Yes, I verify that I completed all parts of this training.
9/16/2022 11:00:37	kerianne.mulvey@padista	Yes, I verify that I completed all parts of this training.
9/21/2022 15:27:07	stacy.martin@padistance.	Yes, I verify that I completed all parts of this training.
9/23/2022 9:48:31	felicia.batrack@padistanc	Yes, I verify that I completed all parts of this training.
10/5/2022 10:46:59	daniella.zenone@padista	Yes, I verify that I completed all parts of this training.
11/15/2022 11:35:01	chelsea.white@padistanc	Yes, I verify that I completed all parts of this training.

READ180



WELCOME

Thank you for joining us

Getting Started with
READ 180 and System 44

Please introduce yourself in the



Professional Services

Dashboard

<p><u>Session Overview</u></p>	<p><u>Reflecting on Rotational Models</u></p>	<p><u>Identifying and Placing Students</u></p>	<p><u>Model for Blended Learning</u></p>	<p><u>Wrapping Up Our Learning</u></p>
<p><u>Our Learning Journey</u></p>	<p><u>Introducing <i>READ 180</i>[®] and <i>System 44</i>[®]</u></p>	<p><u>Lexile[®] Proficiency and Growth Report</u></p>	<p><u>Breaking Down the Content</u></p>	<p><u>Call to Action!</u></p>
<p><u>Feedback Survey</u></p>	<p><u>What's in a Name?</u></p>	<p><u>Phonics Proficiency and Growth Report</u></p>	<p><u>Resource Review</u></p>	<p><u>Extend Your Learning</u></p>
<p><u>Session Sign On</u></p> <p>Session Code: XXXXXX Instructor Name: Dr. Michele Burns</p>	<p><u>Screening and Placing Your Readers</u></p>	<p><u>Enrolling Students using SAM</u></p>	<p><u><i>READ 180</i> Student App and the <i>System 44</i> Student Software</u></p>	<p><u>Resources for Further Learning</u></p>
	<p><u>Navigating SAM[™] and Targeting Reading Levels</u></p>	<p><u>Best Practices for Screening and Placement</u></p>	<p><u>Managing Independent Rotations</u></p>	<p><u>Q & A</u></p>

Getting Started with *READ 180* and *System 44*

[Return to Dashboard](#)

In this 2-hour live online session, you will begin your journey with *READ 180*® and *System 44*® by getting to know the Interchangeable Literacy License and how it supports you in individualizing student learning. You will learn about key tools and resources for screening and placement, whole- and small-group learning, and independent rotations, which will equip you to best support your students who are working to overcome challenges with reading.

Learning Objectives

- Connect key components of *READ 180* and *System 44* to daily instruction.
- Prepare to screen and place students and begin targeted instruction.
- Explore digital tools and resources to support and personalize teaching and learning.

Essential Question

How can I accelerate literacy learning for my students using *READ 180* and *System 44* tools and resources?

Agenda

Welcome and Introductions

Review the learning journey in preparation for the session.

Introducing *READ 180* and *System 44*

Learn about the Interchangeable Literacy License and how it empowers you with both *READ 180* and *System 44* instructional resources.

Screening and Placing Your Readers

Screening and proper placement are key with *READ 180* and *System 44*. Learn about the different screening and placement tools and how to administer them.

Teaching with *READ 180* and *System 44*

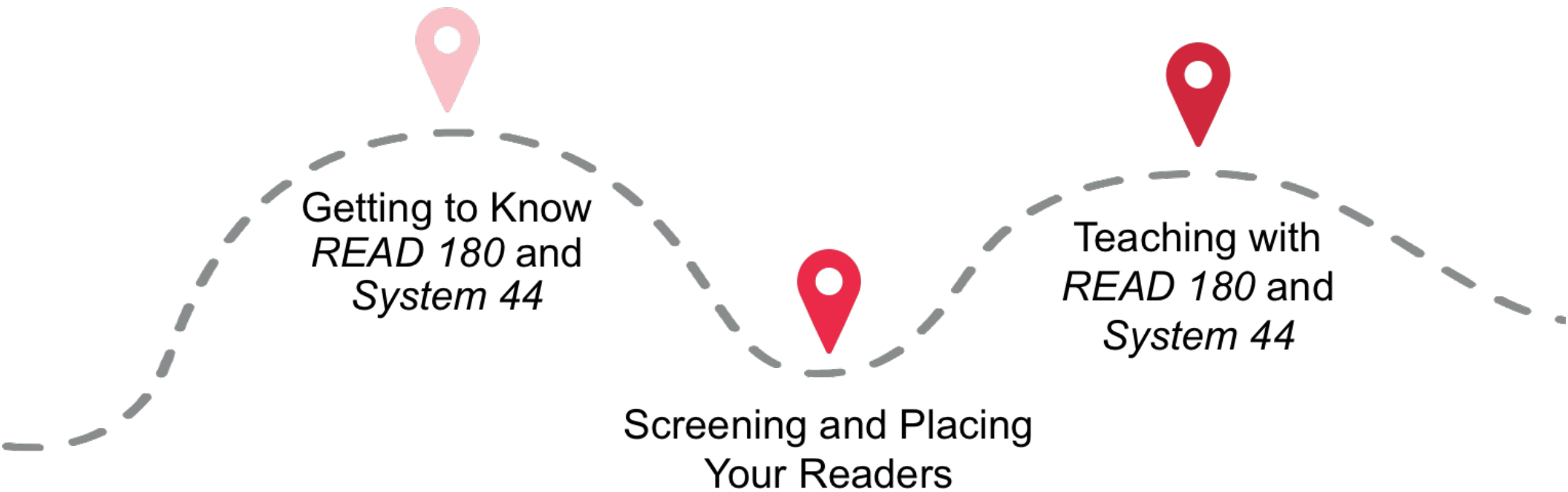
Learn about the *READ 180* and *System 44* instructional models and how to leverage the instructional content and resources to support your students who struggle with reading.

Close and Commit

Reflect on the learning and explore options for further learning.

[Return to Dashboard](#)





Our Learning Journey



[Return to Dashboard](#)

Reflecting on Rotational Models

How do you feel about having your students rotate among different learning stations? Share your feelings by choosing the emoji that represents your experience and feelings and typing an “X” underneath.

<p>I have not used rotations before and need support.</p> 	<p>I am familiar with how to rotate my students but haven't tried it in my class.</p> 	<p>I have used rotations before and am comfortable doing so again.</p> 	<p>I love using rotations and feel very comfortable doing so with my students.</p> 
<p>X</p>	<p></p>	<p>X X x</p>	<p>x</p>
<p></p>	<p></p>	<p>x</p>	<p></p>

Click [HERE](#) or scan the QR code to hear from real *READ 180* students.



What was reading like?



[Return to Dashboard](#)

Introducing *System 44* and *READ 180*



System 44 is a proven-effective foundational reading solution that provides intensive intervention for older struggling readers in Grades 3–12.

READ 180 Universal is a reading intervention program that provides reading comprehension strategies and assessments for Grades 4–12.

System 44 places all students, at any level, on a path to achievement and provides the foundational tools they need to achieve real success in school and life.

With teacher-led instruction, student choice, and adaptive technology, *READ 180* helps students who are behind become active, accomplished readers.

How would you like the ability to use either program at any given time to support all your students at once?

Interchangeable Literacy License

The Interchangeable Literacy License empowers you with the option of leveraging resources and tools from either or both programs, giving you the ability to support all your students, regardless of their starting point. With one license, students will be enrolled in either *READ 180* or *System 44* depending on their screener results.

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Leveling for Targeted Support

With three stages of support, *READ 180* meets all students where they are and accelerates them to grade level. Students at the BR-450 level will be supported by System 44 resources. *System 44* works alongside *READ 180* to support students who need additional foundational reading practice.

	STAGE A Elementary School	STAGE B Middle School	STAGE C High School
LEVEL 0 BR-450L	0 to 1.0	0 to 1.0	0 to 1.0
LEVEL 1 450-600L	1 to 1.9	1 to 1.9	1 to 1.9
LEVEL 2 550-700L	2.0 to 2.9	2.0 to 2.9	2.0 to 2.9
LEVEL 3 650-800L	3.0 to 3.9	3.0 to 3.9	3.0 to 3.9
LEVEL 4 750-900L	4.0 to 6.9	4.0 to 6.9	4.0 to 6.9
LEVEL 5 850-1050L	6.0 to 7.9	7.0 to 8.9	7.0 to 8.9
LEVEL 6 1000-1300L+		8.0 to 10.9	9.0 to 12.0

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Backed by and Built from Research

For more than 15 years, the *READ 180* team has followed the research of what works in the classroom and what produces outcomes.

Characteristics of Struggling Readers



Learn more about the research
behind *READ 180* and
System 44 [here](#) and [here](#).

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The Science of Reading

Human beings are hard-wired for speaking and listening but were not born to read. For us to learn to read, many brain areas and functions must be redirected or trained to work together.

The Simple View of Reading

Developed in 1986 by Philip B. Gough and William E. Tunmer, the Simple View of Reading states that there are two essential processes in learning to read:

1. **Word Recognition** is the ability to read and understand the words on a page.
2. **Language Comprehension** is the ability to make sense of the language we hear and read.

Word Recognition x **Language Comprehension** =



LEARN MORE:
[The Science of Reading at Your Fingertips](#)



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The Reading Rope

Examine the Reading Rope for the components of Word Recognition and Language Comprehension, all of which work together seamlessly in a skilled reader.

Language Comprehension

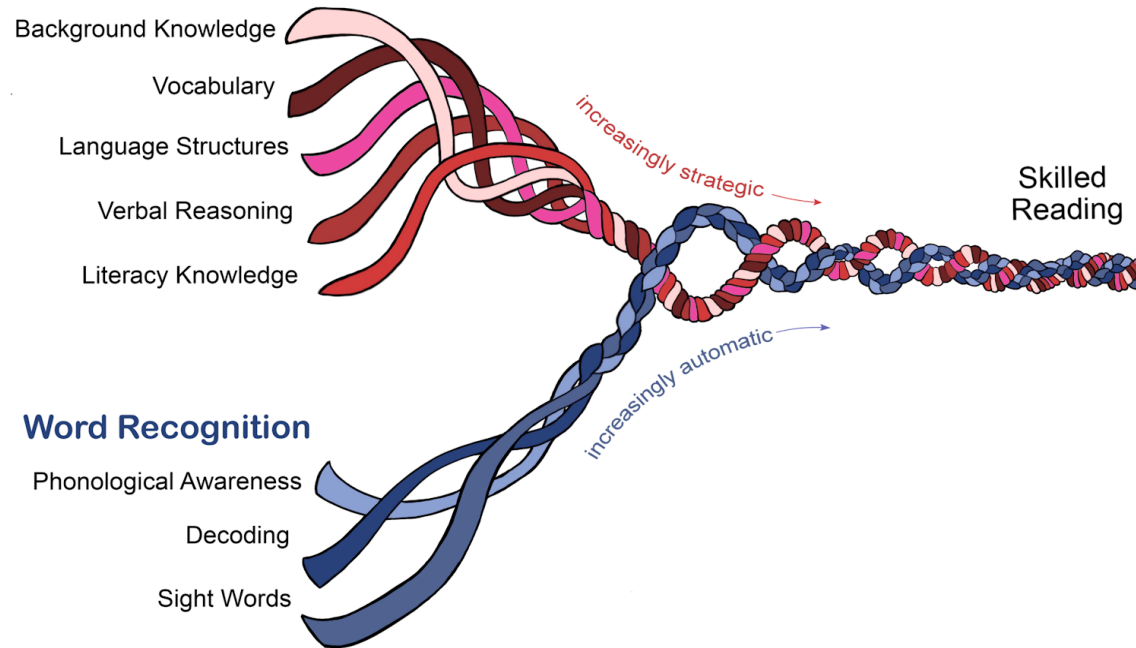


Figure is adapted and extended from Scarborough, 2001, and Cutting, 2009

Click [here](#) for more information about Dr. Scarborough's Reading Rope.

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What's in a Name?

READ 180 may seem intuitive: help all your students do a 180 when it comes to reading! But *System 44* may not be as straightforward.



System

Research is clear that foundational reading must be both **systematic** and **explicit**. There is less understanding of **systematicity**. This is a way of thinking about systems for their various components and interactions. The alphabet is a system made up of sounds and letters, and it's the interactions among the different parts that are critical to understanding the deep orthography of the English language. For example, when silent or signal e is positioned at the end of a word, the vowel that precedes it will be long.

44

The 44 represents the **44 sounds of the English language**. More deeply, it reminds us of the complexity of the English language and the difficulty of learning the ABCs as an older student because the 44 sounds do not correspond one-to-one with the written 26 letters in the American English alphabet.

What are some signs you have noticed that students may need to focus on foundational skills? What are some signs that they may need comprehension support?				
They can't sound out words	Not being able to identify letter sounds	They ask for things to be read aloud each time.	They can't recall what they read	May be able to read passage aloud, but cannot recall what occurred in the text
Reader can't pronounce -tion	Guessing a word based on first few	vowel errors	Ask for audio for readings	Not being able to answer questions

	letters			
Spelling errors	Not being able to blend sounds to create a word	Recall incorrectly based on the reading the words wrong		

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Screening and Placing Your Readers

You have access to two assessments that will assess and automatically place students within the program.



The HMH *Reading Inventory* uses the Lexile Framework as a screening and diagnostic tool to place students appropriately in the program. Use the data from the test results for instructional planning, intervention, and progress monitoring.

- Assesses reading levels
- Includes 20–30 multiple-choice cloze questions
- Adapts to student performance
- Reports results as Lexile measures

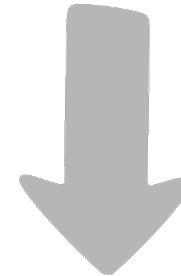
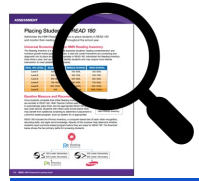
Learn more about the *Reading Inventory* [here](#)

HMH Phonics Inventory identifies students in need of explicit foundational reading instruction. The assessment administered on a computer or tablet can be completed independently by students in about 10–12 minutes.

- Assesses decoding ability
- Includes three test segments:
 - Letter Recognition
 - Sight Words
 - Nonsense Words

Learn more about the *Phonics Inventory* [here](#)

Click below to read more about placing students in your classroom!



[Return to Dashboard](#)

Navigating SAM and Targeting Reading Levels

You will use SAMWeb through HMH Central to target reading levels.

Jennifer Sloane 1

SEARCH | EXIT | HELP | MY PROFILE | HOME

Home Roster Reports Resources Books Portfolio

My Classes

Classes for Jennifer Sloane 1

- 180_2020_2021
- ESD Demo
- English 3D
- Jennifer Sloane
- JO_Read_180
- KFowler Test Class Secondary S44
- KFowler Test Class Stage A
- KFowler Test Class Stage B
- KFowler Test Class Stage C
- KFowler Test Class Upper E S44

Groups

Students for Jennifer Sloane 1

- 9987777, iii7777
- A, Student
- Agnew, Bryant
- Agnew, Bryant
- Alvera, Jose
- Anderson, Michael
- Appleseed, Johnny
- Arens, Phillip
- b, test
- Bain, David

Roster Reports Resources Books Portfolio

[Click here to learn how to access and use the READ180 Interactive Teacher System \(ITS\).](#)

Filter by: All Products and All Message Types

0 acknowledgments 0 notifications 0 alerts 0 reminders

Type	Message	Product	Date
You have no messages at this time. If you believe you should have messages, contact your School Technology Coordinator for assistance.			

Delete Checked

You have these programs available:

[About SAM](#)

Use SAM to Target Reading Levels

1. Log on to SAM. Double-click a student name in the SmartBar to access the

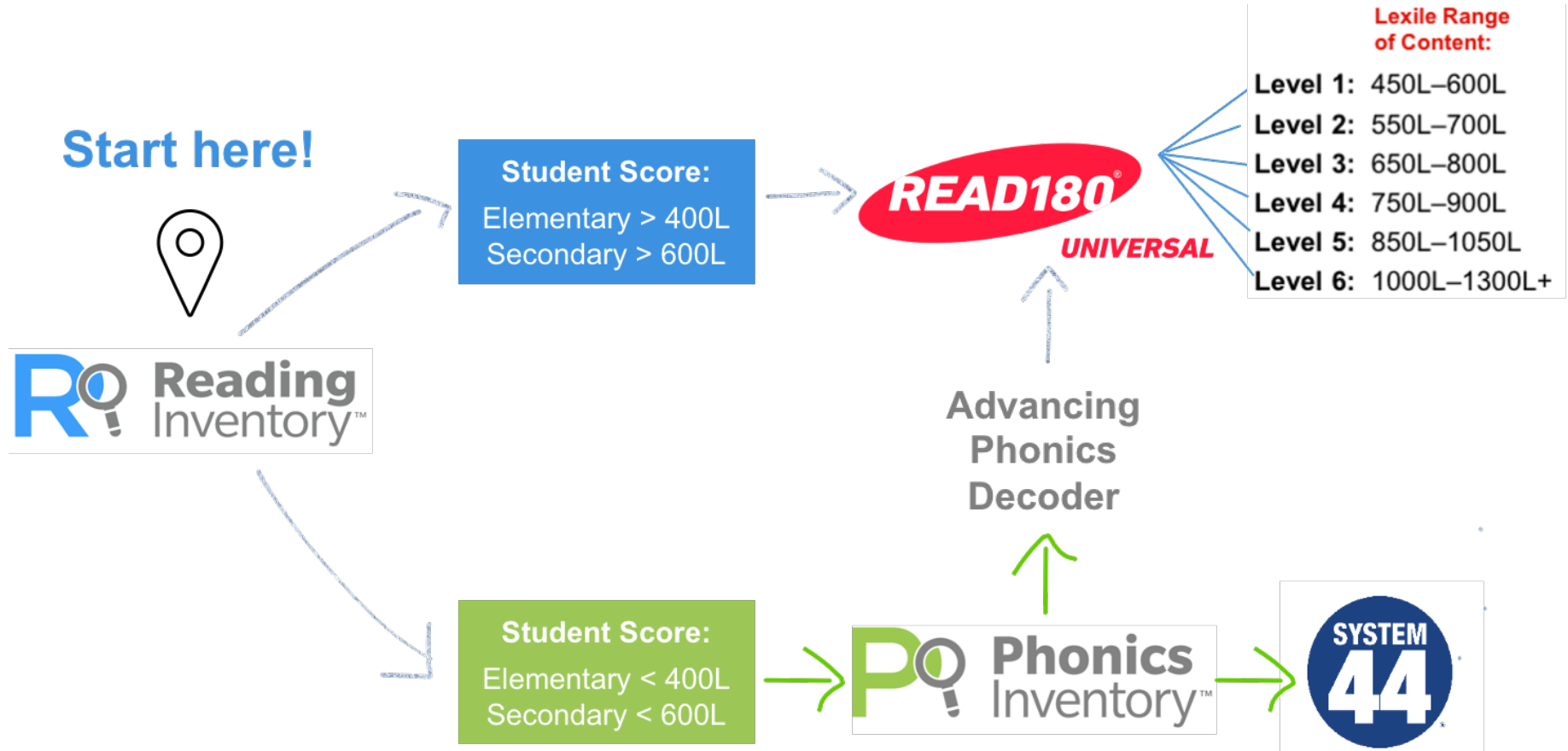
- student profile screen.
2. Click **Settings**, next to the *Reading Inventory* in the Programs menu at the bottom of the screen, to access **Reading Inventory Settings**.
 3. Use the pull-down menu next to Estimated Reading Level under Test Settings to estimate the student's reading level.
 4. Click **Okay** on the confirmation window to confirm the changes.
 5. Click **Save & Return** to return to the student profile screen.

TIP: If all students are reading **Below** or **Far below** grade level, double-click the class name in the SmartBar instead. Then follow steps 2 and 3 to target all students at once.

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Identifying and Placing Students

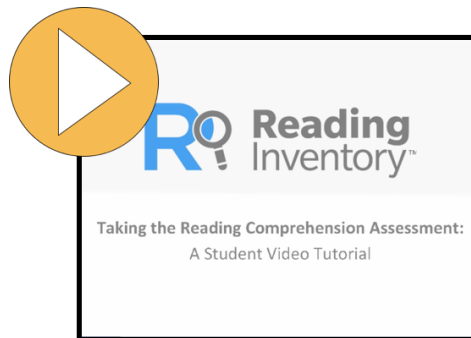
Assess all students using the *Reading Inventory*. If necessary, administer the *Phonics Inventory*.



[Return to Dashboard](#)

Exploring the *Reading Inventory*

Click [here](#) or scan the QR code to view the video.



Questions or Notes

Questions or Notes			
			HMH read08

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Reviewing the Lexile Proficiency and Growth Report

To access your Lexile Proficiency and Growth Report, log on to HMH Teacher Central. Click **Data Dashboard**. The Lexile Proficiency and Growth Report is the first report listed.

Lexile® Proficiency and Growth Report
Intensive Reading 3_G8

TEACHER: Florida, Teacher 1; Teacher, IntRe... GRADE: 8 SCHOOL: Florida DATE RANGE: 08/01/2019 - 03/23/2021

Summary
This report measures student proficiency and growth on the Reading Inventory assessment.

162 ⁺ Average Lexile® Growth
9 Students Improved Their Lexile®
N/A Students Showed No Growth

Performance Level

First Test

Last Test

Student	Grade	Date	Attempt (First)		Attempt (Last)		Growth		
			Lexile®	Level	Date	Lexile®	Level	Expected	Actual
Broadhurst, Indiana	8	12/4/19	769L	Below Basic	7/31/20	856L	Basic	55-80	87
Kinney, Adnan	8	12/3/19	966L	Basic	6/2/20	1056L	Proficient	35-65	90
Neale, Huda	8	12/4/19	796L	Basic	6/3/20	926L	Basic	55-80	130
Sanford, Kelis	8	10/31/19	966L	Basic	6/4/20	1120L	Proficient	35-65	154
Stewart, Ifan	8	12/4/19	826L	Basic	6/3/20	1009L	Basic	45-70	183
Andrew, Anja	8	12/3/19	113L	Below Basic	6/3/20	396L	Below Basic	240-360	283
Lujan, Iris	8	12/3/19	556L	Below Basic	6/2/20	725L	Below Basic	80-125	169
Monroe, Tatiana	8	12/2/19	BR	Below Basic	5/1/20	125L	Below Basic	240-360	125
Watts, Julian	8	11/1/19	412L	Below Basic	5/1/20	650L	Below Basic	105-155	238
Average			600L			763L			162

■ Advanced
 ■ Proficient
 ■ Basic
 ■ Below Basic
 ■ No Test Data

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Monitor Growth

- Monitor how much students need to grow to achieve grade-level proficiency.
- Discuss growth rates and help students set appropriate yearly Lexile measure growth goals.* See *Establishing Reading Inventory Growth Targets* for more information.

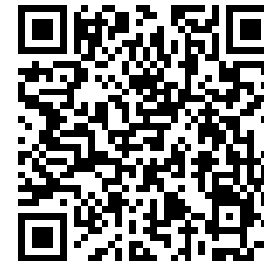
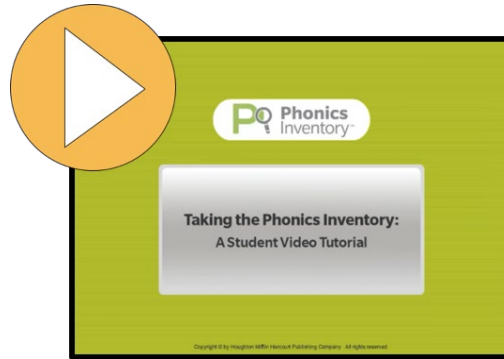
Target Support

- Target additional support to students who are not showing strong gains or whose current *Reading Inventory* scores are below grade-level expectations.
- Carefully analyze results for students whose scores have declined.

[Return to Dashboard](#)

Exploring the *Phonics Inventory*

Click [here](#) or scan the QR Code to view the video.



Questions or Notes			

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Reviewing the Phonics Proficiency and Growth Report

To access your Phonics Proficiency and Growth Report, log on to HMH Teacher Central. Click **Data Dashboard**.

Performance Level Breakdown compares the results of the first and last test administrations and displays the percentage change for each decoding status level

Decoding Status identifies a student as a **Pre-, Beginning, Developing,** or **Advancing Decoder.**

Name	Grade	Test Date	PI Fluency Score	PI Decoding Status	Test Date	PI Fluency Score	PI Decoding Status
Chiu, Amy	7	8/1/15	9	Pre-Decoder	8/17/15	24	Advancing
Koyacki, Theo	7	8/6/15	21	Developing	8/6/15	30	Advancing
Collins, Chris	7	8/2/15	8	Beginning	8/2/15	14	Developing
Rowe, Gabriela	7	8/6/15	13*	Beginning	8/6/15	13*	Beginning

PI Fluency Score	PI Decoding Status	Recommended Instruction
0-10	Pre-Decoder	Phonemic awareness, letter names, letter-sound correspondence
0-10	Beginning Decoder	Foundational phonics
11-22	Developing Decoder	Targeted phonics remediation
23-50	Advancing Decoder	Vocabulary, comprehension, fluency

Decoding Status	Description	Recommended Instruction
Pre-Decoder	Little or no knowledge of letter names or letter-sound correspondences	<ul style="list-style-type: none"> • Phonemic awareness • Letter names • Letter-sound correspondences
Beginning Decoder	Can identify letter names but cannot decode fluently	<ul style="list-style-type: none"> • Basic phonics, starting with consonants and short vowels • Related phonemic awareness
Developing Decoder	Can fluently decode words with consonants and short vowels but cannot fluently decode more complex words	<ul style="list-style-type: none"> • Targeted phonics remediation to address skill gaps and areas of weakness • Instruction focused on more advanced skills, such as blends, digraphs, long-vowel patterns, and syllables
Advancing Decoder	Can decode with adequate fluency and struggles with reading for a different reason	<ul style="list-style-type: none"> • Advanced word study • Vocabulary • Comprehension • Fluency with connected text
<p><i>*Once students identify as Advancing Decoders, they are ready for READ 180. Administer the Reading Inventory to see an updated Lexile Score.</i></p>		

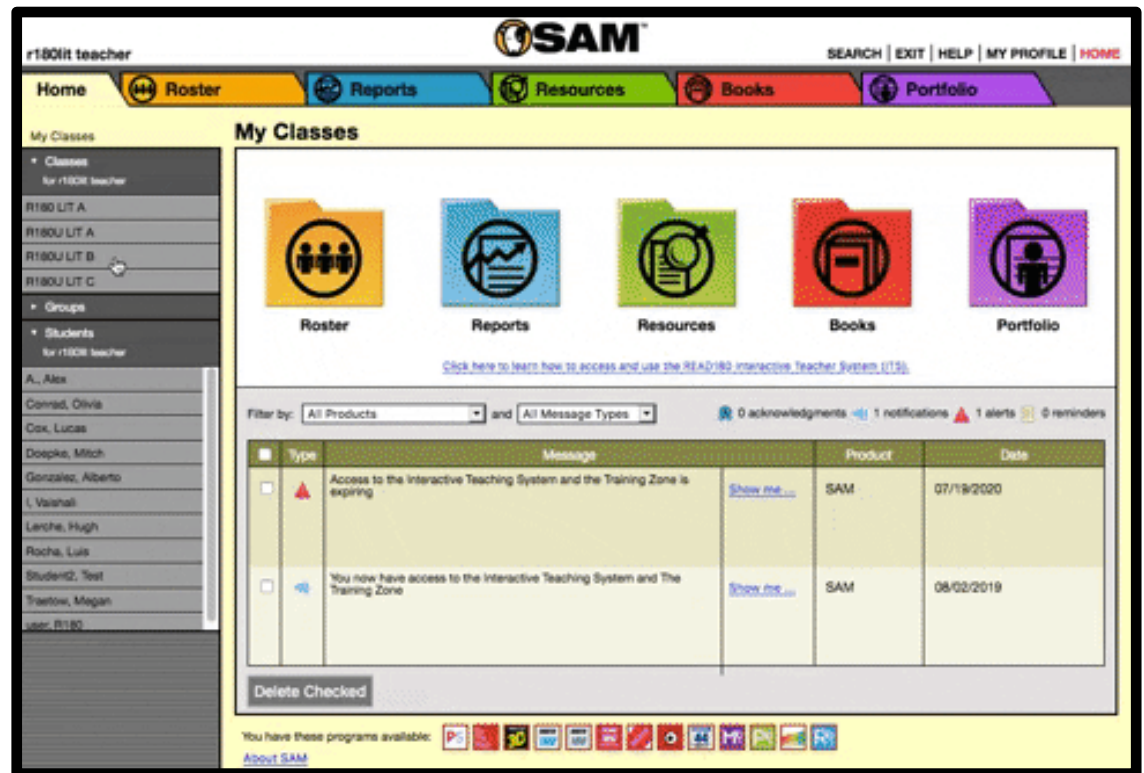
[Return to Dashboard](#)

Enrolling Students using SAM

While you can enroll students in HMH Teacher Central, SAM is best for batch enrollment. If you need to enroll your own students in the *Reading Inventory* and *Phonics Inventory*, use SAM to enroll all in both assessments at once.

To enroll your students:

1. Log on to HMH Central.
2. Click **SAMWeb**.
3. Double-click your class.
4. Click **Manage Student Enrollment** under Manage Roster.
5. Use the scroll bar to scroll right until you see the *Reading Inventory* and the *Phonics Inventory*.
6. Click the check box at the top of each column to enroll all students in both assessments.



Need more help? Check out these help pages to learn more

about the [Reading Inventory](#) and the [Phonics Inventory!](#)

[Return to Dashboard](#)

Targeting Reading Levels



Target students **before** they take the *Reading Inventory* to help the software identify a starting point close to the student's reading level, reducing testing time and improving accuracy.

To help approximate reading levels, you can do the following:

1. **Review standardized test scores:** Use normative data to target reading levels. Students with scores in the 5th percentile are Far Below Grade Level, in the 25th percentile are Below Grade Level, in the 50th percentile are On Grade Level, in the 75th percentile are Above Grade Level, and in the 95th percentile are Far Above Grade Level.

Far Below Grade Level	5th percentile
Below Grade Level	25th percentile
On Grade Level	50th percentile
Above Grade Level	75th percentile
Far Above Grade Level	95th percentile

2. **Consider teacher observations:** Talk with students' former teachers, review past report cards, and consider IEPs.

 **Do not target if unsure** 

If you are still unable to approximate reading levels or do not have enough student data, do not target. For any untargeted students, the *Reading Inventory* automatically provides a first test item with a Lexile measure in the 50th percentile of grade-level proficiency.

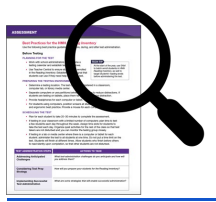
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Best Practices for Screening and Placement

Review the steps below and think about some other steps you might take to prepare your students for assessment.

- Ensure that all testing computers are connected to HMH Central.
- Check that every computer has a pair of working headphones so students can hear test directions. Test the sound quality of every headset before administering the assessment.
- Make sure the testing area is quiet and free from distractions.
- Check that computer stations are clean and well-lit, with sufficient room between each seat.
- Be sure to schedule enough time for the test.
- Prepare a silent, independent activity for early finishers.
- Closely monitor the test administration to answer questions and prevent distractions.

Your Turn! Access our session Jamboard to share your own best practices with the group!



Click above to read more about testing best practices.



Remote Support: Click [here](#) to explore recommendations for students taking the assessments remotely.

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Teaching with *READ 180* and *System 44*

Click [HERE](#) or scan the QR code to step inside a *READ 180* classroom.



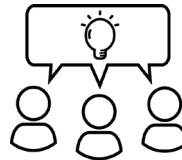
READ 180 and *System 44* value a **Growth Mindset** approach. Read more about instilling a Growth Mindset in your students [here](#).

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Reflecting on the Video

Important Notes	

My Opinion	



My Concerns	

Questions	

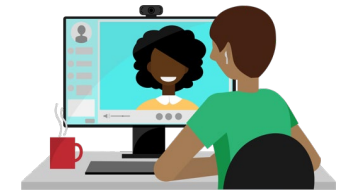
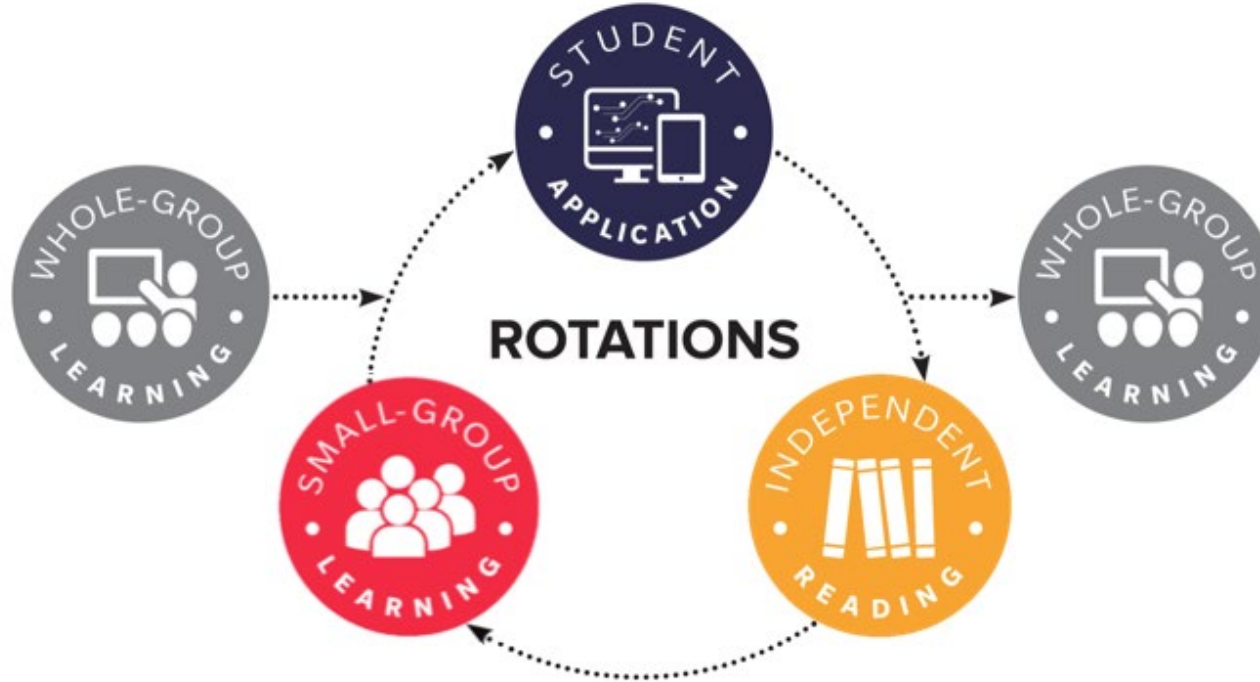
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Model for Blended Learning

The foundation of *READ 180* and *System 44* is the model for blended learning, which is backed by more than 15 years of research and results. The model organizes class time to provide a balance of direct instruction, scaffolded practices, and small-group interaction. It is designed to maximize instructional time and accelerate achievement, blending synchronous and asynchronous learning seamlessly.



Remote Support: Click [here](#) to access at-home learning support.

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Organizing Your Classroom



Visualize your classroom!

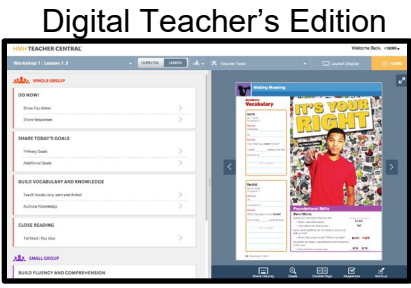
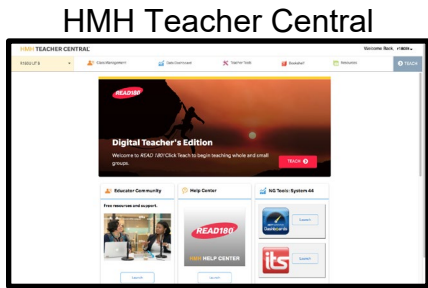
What are some ways that you could arrange your classroom to better support the Blended Learning Model?

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Whole-Group Learning

Begin class by facilitating instruction in close-reading strategies, academic vocabulary, writing, and academic discussion with the entire class.

Teacher Materials



Student Materials

ReaL Book

Blended Learning Handbook





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Navigating a Workshop

READ 180 content is organized into 12 workshops. Workshops are divided into two parts. Throughout each part, students engage in different lesson types, each designed to build specific skills and strategies.

WORKSHOP 1 PREVIEW
Stand Up

Use this overview of lesson texts and types to preview the teaching and learning for this Workshop.

WHAT'S SIGNIFICANT ABOUT Stand Up?
In 1958, in response to the fact that children's basic human rights were being violated around the world, the United Nations adopted the Declaration of the Rights of the Child. Since then, many people have worked to improve the lives of children in need. These of the children who were helped are now leading efforts to improve the lives of less fortunate children in several areas around the world.

TEACHER CENTRAL
Download these resources for planning information, including Standards-Based Lesson Goals, Resources for Differentiated Instruction, and detailed text information.
• Workshop 1 Planning Guide
• Workshop 1 Text Overview
• Daily Lesson Plans

KEY TO THE COLORS
Building Knowledge
Making Meaning
Language Development
Writing
Effective Expression

PART 1

- LESSON 1.1** Workshop Opener and Anchor Video
Preview the Workshop. Build background via the Anchor Video.
- LESSON 1.2** Concept Map & Content-Area Vocabulary
Connect to the Key Concept: Forfeited content-area vocabulary.
- LESSON 1.3** It's Your Right
Students learn about human rights violations that children around the world experience and basic human rights of children should have.
- LESSON 1.4–1.5** Street Smarts
To see the fight for human rights in action, students read about Chris "Toot" Vekko and his award-winning organization that works to help homeless children in the Philippines.
- LESSON 1.6** Build Comprehension
Deepen text comprehension: Central idea and Details.
- LESSON 1.7** Language Development
• Morphology Focus: Prefixes pre-, in-
• Vocabulary Strategy: Context Clues
- LESSONS 1.8–1.9** Malala Yousafzai's Amazing Journey
Students read "Malala Yousafzai's Amazing Journey," about the youngest Nobel Peace Prize winner in history and her efforts to promote education for girls around the world.
- LESSON 1.10** Build Comprehension
Deepen Text Comprehension: Summarizing
- LESSON 1.11** Paragraph Writing
Writing a Paragraph: Explain how Malala Yousafzai's life has affected the work she does today.

INTERIM WORKSHOP ASSESSMENT
LESSON 1.12 CHECKPOINT

PART 2

- LESSON 1.13** Concept Organizer & Content-Area Vocabulary
Connect to the Key Concept: activist
Forfeited content-area vocabulary.
- OPTIONAL** Digital-Only Fluency Text
"My Name is Iqbal" details the life of a boy in Pakistan who found the courage to free himself and his friends from the hands of child slavery.
- LESSON 1.14** Story of a Child Slave
Students meet James Kofi Annan, a former child slave who uses his freedom to help other children in Ghana.
- LESSON 1.15** The Fight Against Child Slavery
By reading an interview with James Kofi Annan, students learn about his charity, Challenging Heights, and how it helps former child slaves.
- LESSON 1.16** I Dream a World
Students explore equality through the words of poet Langston Hughes, who envisions a peaceful world.
- LESSON 1.17** Build Comprehension
Analyze Literary Elements: Theme
- LESSON 1.18** Essay Writing
Analyze a model informative essay.
- LESSON 1.19** Essay Writing
Plan your essay: Choose either Malala Yousafzai or James Kofi Annan and describe the activist's life and the work he or she does.
- LESSON 1.20** Essay Writing
Writing Focus: Thesis Statement.
Organize and draft an essay.
- LESSON 1.21** Essay Writing
Transitions and Conventions
• Introduce Evidence
• Sentence Fragments
- LESSON 1.22** Essay Writing
Assess: Rating Your Informative Essay
- LESSON 1.23** Career Focus & Project
• Career Focus: Problem Solver
• Project: Create a Flyer

END-OF-WORKSHOP ASSESSMENT
LESSON 1.24 CHECKPOINT

T28 READ 180 UNIVERSAL Standards Learning Handbook Workshop 1 Preview T29

Learn more about the structure of a workshop [here](#).

Stage B, Workshop 1 Preview. See a close-up [here](#).

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Lesson Types

Each *READ 180* Workshop includes five main lesson types.

Each lesson type is color-coded and appears multiple times throughout a Workshop in order to motivate, engage, and challenge students while accelerating their background knowledge, ability to analyze text, acquisition of academic vocabulary, and understanding of topics across content areas.

Building
Knowledge

Making
Meaning

Language
Development

Writing

Effective
Expression

Learn more about the lesson types [here](#).

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Breaking Down the Content

Every Workshop

- Lesson 1
 - Workshop Opener
 - Anchor Video
- Concept Maps

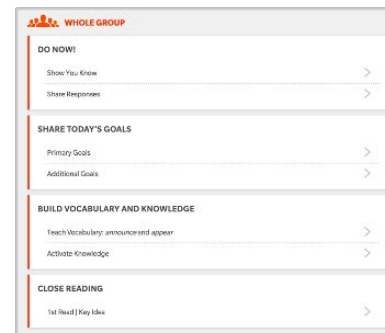


Every Lesson

- Daily Do Now!
- Today's Goals

Text-Based Lessons

- Build Vocabulary and Knowledge
- Close Reading
 - 1st Read



To learn more about the nine **instructional routines**

in *READ 180* Universal, click
[here](#).

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Reflecting on Whole-Group Learning

Record your observations of Whole-Group Learning in the table below.

I notice . . .	I like . . .	I wonder . . .

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Small-Group Learning

During Small-Group Learning, *READ 180* students and *System 44* students work in small groups and use different materials to support individual learning needs.

	Whole-Group Learning	Small-Group Learning	Independent Reading	Student Application
READ 180 Students 	<i>ReaL Book</i>	<i>ReaL Book</i>	<i>READ 180</i> library	<i>READ 180</i> Student App
System 44 Students 	<i>ReaL Book</i>	<i>ReaL Book, 44Book, RDI, and Fluency Texts</i>	<i>System 44</i> library and Decodable Digest	<i>System 44</i> Student Software



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Team Sign-Up

Choose a resource you are interested in exploring in more depth. Sign up for a team by entering your name in a column. Then, explore the resource through the lens of differentiated instruction. Discuss with your teammates, and record your summaries on the [Resource Review](#) page.

	Team 1	Team 2	Team 3
Resource	<i>ReaL Book</i> (accessible through HMH Teacher Central)	<i>44Book</i> (accessible through ITS)	RDI (accessible through ITS or Resources on HMH Teacher central)
Team Members			
Team Members			
Team Members			
Team Members			
Team Members			

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Resource Review

Use the space below to share your reflections and summaries on your resource.

	<i>ReaL Book</i>	<i>44Book</i>	RDI
Write a summary of your resource.			
What did you like or note about it?			
How and when might you use this resource to differentiate instruction?			
What questions do you still have?			

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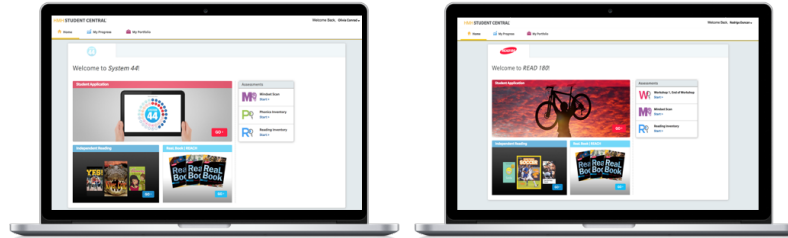
Independent Rotations

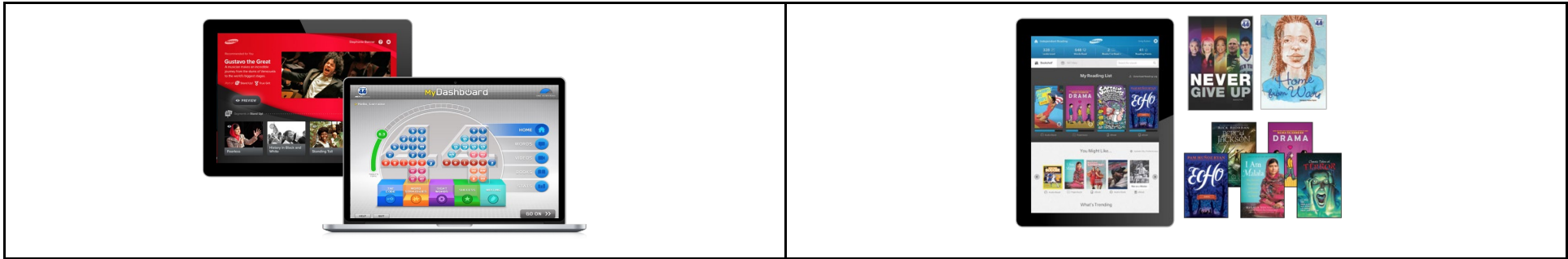
In the model for blended learning, students engage in two independent rotations: software and Independent Reading.

Student App (*READ 180*) and
Student Software (*System 44*)

Independent Reading

Students can access their software and digital independent reading materials through HMH Student Central.

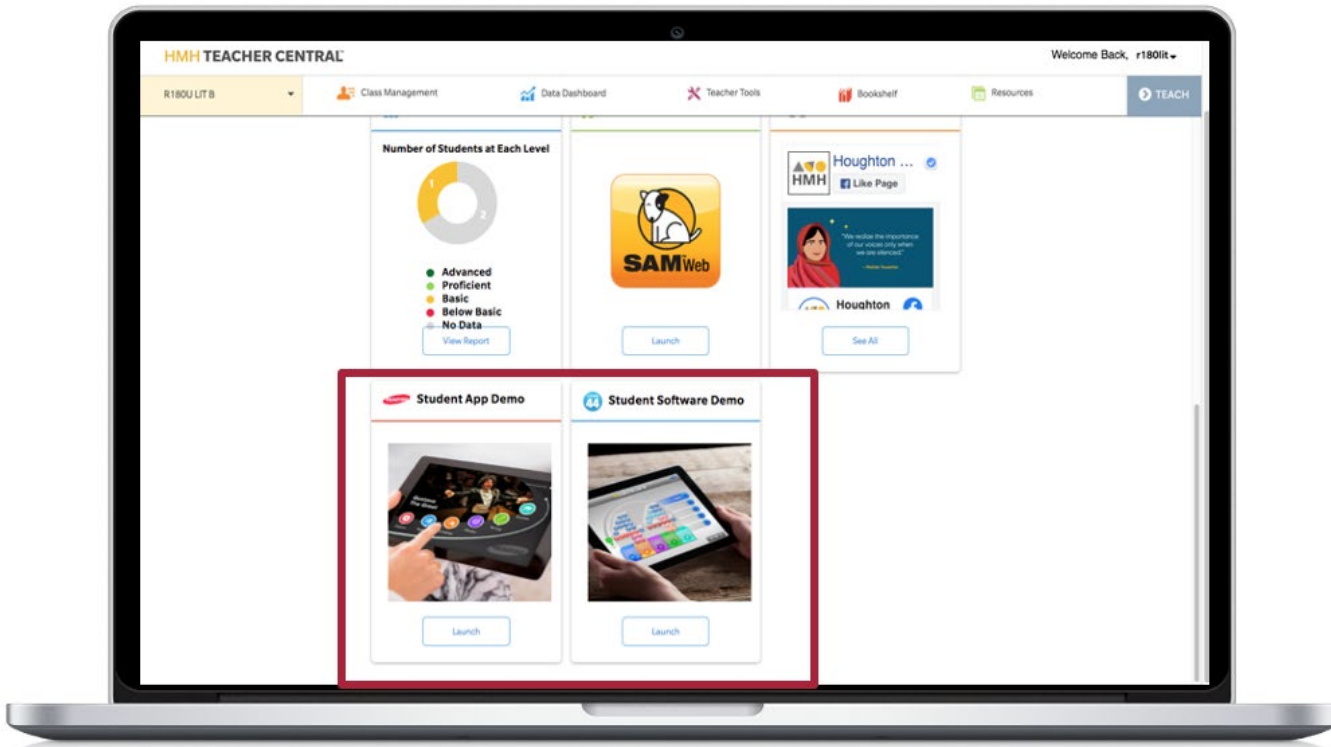




[Return to Dashboard](#)

READ 180 Student App and the *System 44* Student Software

To learn more about the Student App rotation, visit HMH Teacher Central, and then launch the demos at the bottom of your dashboard.



Learn More!

Review the resources below to learn more about the *READ 180* and *System 44* Student App Rotation.

READ 180

[*READ 180* Demo Navigation Help \(including videos\)](#)

[*READ 180* Student App Overview](#)

System 44

[*System 44* Demo Navigation Help \(including videos\)](#)

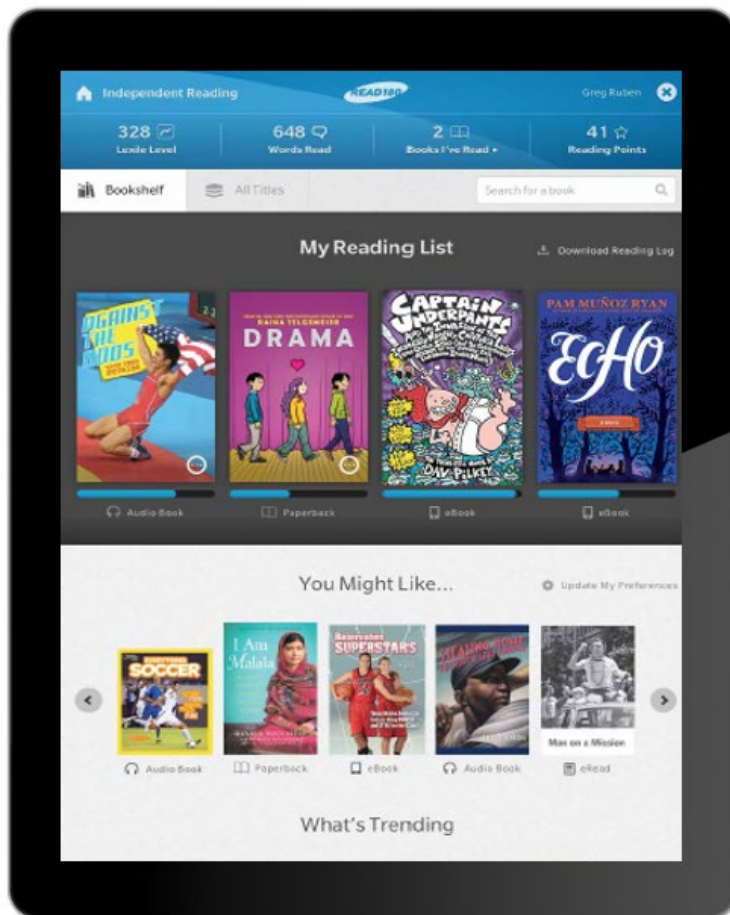
[*System 44* Instructional Software Overview](#)

[*System 44* Scope and Sequence](#)

[Return to Dashboard](#)

Independent Reading

You can review the *READ 180* and *System 44* independent reading libraries by clicking the **Bookshelf** tab in HMH Teacher Central.



INDEPENDENT READING

- Paperbacks** High-interest, leveled nonfiction and fiction texts from the classroom library
- Audiobooks** Grade-level books that model fluent reading and comprehension
- eBooks** Informational online texts related to Student Application topics
- eReads** Leveled online nonfiction articles tied to each Workshop topic

Book covers shown: *The Revolution of Evelyn Serrano*, *Learning to Fly*, *Visitors*, *Ancient Army*.

*Note that *System 44* students have access to 56 titles, available in both paperback and eBook format. All *System 44* eBooks are enabled with Read Aloud support, read by a reading coach.

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Managing Independent Rotations

Click each image below to learn more about managing independent rotations and empowering students to be productive and accountable during their independent learning.

Student App

Independent Reading

Student App

Managing the Rotation

Implement management strategies to keep students working productively and minimize interruptions to learning during the Student App rotation.

Check In With Students
Briefly visit the Student Application area when students in Small-Group Learning are working independently. Stop by each workstation to check in with students and answer any questions. Ask students to summarize the Segment video, read aloud their leveled passage or writing, or share a few of their Power Words.

Prepare for Technical Issues
Proactive planning for technical issues will help keep students on task, even when computers go down. Follow these tips to prepare for occasional technical difficulties:

- Equip each workstation with a red plastic cup or flag. If students experience technical difficulties, they can place the cup or flag on top of their monitor or by their chair. Students can complete a "Plan B" assignment (see below) or read their Independent Reading book while they wait for assistance.
- Keep a log or notebook in the Student App area to track technical needs. Ask students to record their computer number and the exact error message they see on the screen to aid in support.
- Visit the HMH Product Support website at www.hmhco.com/productsupport to download Student Application updates and manuals.

Prepare "Plan B" Assignments
Have at least one paper-based or printed assignment ready in case your classroom technology is unavailable for an extended period of time. Try one of the following "Plan B" assignments for students to complete during the Student App rotation.

Digital Reads If the issue is with the Student App only, rather than the computer and the Internet, then have students read eReads or eBooks during this time.

QuickWrites Have students catch up on any paperback, audiobook, eRead, or eBook QuickWrites they have not yet completed. Keep copies of these reproducibles available for student use.

Library Book Projects *READ 180* includes engaging Final Book Projects on Teacher Central. For example, students can write a book review, create a new front cover, or make a plot time line. Download and print copies of the Final Book Projects from the Independent Reading resources in the Resources tab. Keep these copies on hand for student use in the Student App area. Provide time for students to present their projects to the class.

Teaching and Planning

Independent Reading

Managing the Rotation

Check in frequently with students in Independent Reading to ensure that they are selecting books they enjoy, engaging with the text, and completing related resources for accountability.

Review Reading Logs
Make copies of the Independent Reading Log. Have students complete an entry for each text they read during Independent Reading. Collect and check the logs once per week to ensure that students are completing them correctly and reading their books at an expected pace. Consider checking logs at the start of Small-Group Learning each day to provide immediate accountability, check for understanding, and address any questions.

Independent Reading Log

Make Reading Count
Consider making Independent Reading a part of student grades. This helps students understand the importance of Independent Reading and celebrates their progress. Use the following resources for accountability, assessment, and grading in this rotation.

- **QuickWrites and Graphic Organizers** These resources allow students to engage with and think about the text they are reading. Have students turn in completed pages so that you can monitor progress.
- **Reading Counts! Quizzes** These quizzes assess test student understanding of each Independent Reading text. Have students take either the Standard Quiz or the Challenge Quiz after finishing all other work for a book. Run the Independent Reading Report to see student quiz results to inform grading.

SEE ALSO
See page 73 for detailed information about Standard Quizzes and Challenge Quizzes in Independent Reading.

Check In With Students
Visit the Independent Reading area when students in Small-Group Learning are working on their own. Check in with readers to ensure that they are working productively and engaging with their books. When checking in, ask students to read a few paragraphs aloud so you can evaluate their fluency. Ask follow-up questions, such as: *Are you enjoying your book? Why or why not? How did you choose that book to read? What have you learned so far? About how many pages are you reading per day?*

Teaching and Planning 131

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Wrapping Up Our Learning

Click [HERE](#) or scan the QR code to hear from successful and confident readers.



What is reading like now?



[Return to Dashboard](#)

Call to Action!

How will you introduce your students to *READ 180* and *System 44* to build excitement?

How will I set up my classroom to foster community (consider remote learning needs)?	What are three steps I will take to ensure a successful start?	<u>What is my biggest question?</u>

[Return to Dashboard](#)

Call to Action! (continued)

How will you introduce your students to *READ 180* and *System 44* to build excitement?

How will I set up my classroom to foster community (consider remote learning needs)?

What are three steps I will take to ensure a successful start?

<u>What is my biggest question?</u>

[Return to Dashboard](#)

Extend Your Learning

To prepare for a strong start, review [First Steps for Success](#), and complete the steps below.

Planning and Preparing (Before School Starts)	
Ensure that you have all <i>READ 180</i> and/or <i>System 44</i> student and teacher materials, including credentials to HMH Central.	<input type="checkbox"/>
Set up your classroom to support Whole-Group Learning and each station rotation. Learn more about classroom setup here .	<input type="checkbox"/>
Ensure enough devices for a third of your class and confirm: <input type="checkbox"/> Internet connection <input type="checkbox"/> HMH Central bookmark <input type="checkbox"/> Headphones with microphones	<input type="checkbox"/>
Confirm class schedule and ensure students are enrolled. If you are enrolling your own students, learn more here .	<input type="checkbox"/>
Preview and plan Getting Started lessons (or whichever Workshop you choose to begin with).	<input type="checkbox"/>
Getting Started (Weeks 1–2)	
Provide students with log ons and do a guided tour of HMH Student Central.	<input type="checkbox"/>
Establish a safe classroom community through the Building Community lessons in the Getting Started Workshop, and teach and practice class procedures.	<input type="checkbox"/>
Administer the <i>Reading Inventory</i> and the <i>Phonics Inventory</i> as needed.	<input type="checkbox"/>
Teach and practice rotations in the model for blended learning.	<input type="checkbox"/>
Guide students to set meaningful reading goals.	<input type="checkbox"/>

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Resources for Further Learning



[Learn more about System 44](#)



[Learn more about
READ 180 Universal](#)



Podcast: [Virtual Learning
During COVID 19](#)



[READ 180 Universal Online
Help](#)



[How to Get Students
Engaged in Reading](#)



[System 44 Next Generation
Online Help](#)



Getting Started Modules
→ Log on to HMH Teacher Central, and click Getting Started Modules under Professional Learning.



[READ 180 Universal
Technology User's Guide](#)

[Return to Dashboard](#)

Q & A

Enter your questions in the corresponding sections below. We'll work together to find answers!

Questions	Answers

hmhco.com
hmhco.com/professionalservices
hmhco.com/programs/read-180-universal
hmhco.com/programs/system-44

Thank you for participating today!

Session Code: XXXXX

Instructor Name: <Enter your name.>

Sign On

Scan the QR code or
go to learn.hmhco.com/signin
on your computer, phone, or tablet!



Feedback Survey

We value your feedback.
Scan the QR code or go to hnhco.com/survey
on your computer, phone, or tablet!




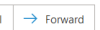



Timestamp	Email Address	I verify that I completed/participated in this training and submitted ALL requested pieces if applicable
8/15/2022 9:44:24	amy.thornton@padistance.org	Yes, I verify that I completed all parts in this training or task.
8/15/2022 10:50:41	maggie.kelly@padistance.org	Yes, I verify that I completed all parts in this training or task.
8/15/2022 12:15:42	lauren.donofrio@padistance.org	Yes, I verify that I completed all parts in this training or task.
8/29/2022 7:48:36	stacy.martin@padistance.org	Yes, I verify that I completed all parts in this training or task.
8/30/2022 9:04:16	valerie.metz@padistance.org	Yes, I verify that I completed all parts in this training or task.
8/15/2022	tamara.donahue@padistance.org	Yes, I verify that I completed all parts in this training or task.


Month	Date(s)	Time	Special Ed Topic	Staff Facilitators
September	9/7/2022	12:00-12:30	The TEAM approach for IEPs	Blose, Levenson
October	10/12	12:00-12:30	Related Services - All you need to know!	Paul, Bate, Hoffman
November	11/9	12:00-12:30	Transition - Importance K-12	Budd, Grossman, Corcoran
December	12/14	12:00-12:30	Intervention/Enrichment/WIN times	Wierdak, Glancy
January	1/11	12:00-12:30	Extended School Year (ESY)	Alicandro, Olszewski, Reddecliff
February	2/15	12:00-12:30	What is Resource Room?	Metz, Smith, Zenone
March	3/15	12:00-12:30	Role of a parent with state assessments	Winter, Batrack, Martin
April	4/13	12:00-12:30	Progress Monitoring - what does it mean?	Galando, Mulvey, Watenpool
May	5/24	12:00-12:30	Summer routines and resources	Bigos, Dunn, White

Feb 22, 2023 Activity Log: Monthly Special Education Workshop Wednesday! This Wednesday, 2/22/23!

 Stephanie Faith via ParentSquare <donotreply@parentsquare.com>
To:  stephanie.faith@padistance.org

  Reply  Reply All  Forward 

Wed 2/22/2023 12:36 PM

 If there are problems with how this message is displayed, click here to view it in a web browser.
[Click here to download pictures.](#) To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Feb 22, 2023 Post Activity Log

Monthly Special Education Workshop Wednesday! This Wednesday, 2/22/23!



RSVPs		2 New • 2 Total
Nicole Coulter	2	
Rafaela Ortega	No	






Appreciations		2 New • 2 Total
Nicole Coulter (Feb 21 at 11:47 AM)		
Quinn Cushnie (Feb 21 at 11:43 AM)		

[View Post](#)



Nov 09, 2022 Activity Log: Special Education Parent/Guardian Workshop Wednesday - November 9!

 Stephanie Faith via ParentSquare <donotreply@parentsquare.com>
To:  stephanie.faith@padistance.org

  Reply  Reply All  Forward 

Wed 11/9/2022 10:36 AM






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Special Education Parent/Guardian Workshop Wednesday - November 9!


RSVPs		5 New • 6 Total
Linda Williams	1	
Adesh Odyssey	No	
Damaris Vernola	1	
Caryn Ess	No	
I have a doctor app		
Matthew Galando	1	
Jennifer Viera	1	
Julianne Ramon	No	
Kristy Bronson	1	
Tiffinay Myers	No	
Working		

Oct 19, 2022 Activity Log: Special Education Workshop Wednesday - tomorrow, 10/19/22

 Stephanie Faith via ParentSquare <donotreply@parentsquare.com>
To:  stephanie.faith@padistance.org

  Reply  Reply All  Forward 

Wed 10/19/2022 4:38 PM

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 Pennsylvania Distance Learning Charter School

Oct 19, 2022 Post Activity Log

Special Education Workshop Wednesday - tomorrow, 10/19/22

RSVPs		2 New • 2 Total
Ashley Mauger	1	
Linda Williams	1	
Rafaela Ortega	No	

Appreciations		1 New • 1 Total
Ashley Mauger (Oct 18 at 03:41 PM)		

[View Post](#)



Mar 23, 2023 Activity Log: Change of time for Special Education Workshop Wednesday - today at 11:30!!



Stephanie Faith via ParentSquare <donotreply@parentsquare.com>
To: stephanie.faith@padistance.org

Reply Reply All Forward

Thu 3/23/2023 8:34

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✉ Pennsylvania Distance Learning Charter School

Mar 23, 2023 Post Activity Log

Change of time for Special Education Workshop Wednesday - today at 11:30!!

RSVPs	1 New • 1 Total
Susan Heck	1
Marilyn Gomez	No
7 hours late	

May 24, 2023 Activity Log: Special Education families - Workshop Wednesday, May 24!!



Stephanie Faith via ParentSquare <donotreply@parentsquare.com>
To: stephanie.faith@padistance.org

Reply Reply All Forward

Wed 5/24/2023 3:35 PM

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Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

✉ Pennsylvania Distance Learning Charter School

May 24, 2023 Post Activity Log

Special Education families - Workshop Wednesday, May 24!!

RSVPs	4 New • 5 Total
Erin Chavez	No
Amanda Culler	1
Lisette Mendez	1
Cheri Mosher	1
Joseph Hill	1

[View Post!](#)

Dec 13, 2022 Activity Log: Special Education Parent/Guardian Workshop Wednesday - this Wednesday, Dec 14!



Stephanie Faith via ParentSquare <donotreply@parentsquare.com>
To: stephanie.faith@padistance.org

Reply Reply All Forward

Tue 12/13/2022 9:34 AM

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✉ Pennsylvania Distance Learning Charter School

Dec 13, 2022 Post Activity Log

Special Education Parent/Guardian Workshop Wednesday - this Wednesday, Dec 14!

RSVPs	2 New • 2 Total
Jacqueline Green	1
Linda Williams	1

Appreciations	1 New • 1 Total
Susan Heck (Dec 12 at 09:09 AM)	

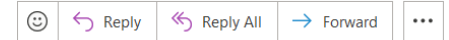
PaTTAN Important Conference Reminder - 2023 AAC Unleashed: Empowering Diverse Communicators



Course Administrator <CourseWhere@pattan.net>

To stephanie.faith@padistance.org

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.



Tue 5/9/2023 1:17 PM

Dear Registrant,

We look forward to seeing you at the AAC Talks web conference this Friday! To ensure you have the information needed for the sessions you plan to attend, you will need to log into AAC Talks Schoology course in advance where you will find zoom links for each session and accessible handouts provided by the speakers.

If you have not already signed up with Schoology and accessed the course, please do so **TODAY**. To access Schoology, you will follow the steps:

IF YOU DON'T ALREADY HAVE A SCHOOLOGY ACCOUNT:

1. Go to <https://app.schoology.com/register.php> and click Student.
2. Enter your Access Code for the appropriate course, as listed above.
3. Fill out the form with your information.
4. Click Register to Complete.

IF YOU DO HAVE A SCHOOLOGY ACCOUNT:

1. Log into your Schoology Account.
2. Click on "Courses" (upper lefthand side).
3. Click on "My Courses" (blue button, righthand side).
4. Click on Join a Course (blue button, righthand side).
5. Enter your Access Code for the appropriate course, as listed above.

AAC Talks 2023 join code is FRNJ-VDJV-FQWHT

Additional Instructions for Accessing Schoology may be found at <https://docs.google.com/document/d/1PGkfs3dTfsnymE-FPC8F6UYqWaNBtSHijZn83UUrKtU/edit?usp=sharing>