Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Heartwood Charter School	Stephanie Felton-Priestner Executive Director	stephanie@heartwoodcharterschool.org 415-488-9572

Plan Summary 2026-27

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

The mission of Heartwood Charter School is to provide a supportive independent study learning environment in which students may choose a number of paths inspired by the whole child approach of public Waldorf education, including home study options. We seek to provide students with an unshakable sense of their connection to and relationship with the natural world and with each other, and by extension, the community of humanity. Our goal is to graduate students who are proficient in all core subjects, well-prepared to pursue further academic and personal goals, and motivated to make positive, ethical and creative contributions to their world.

The community is comprised of families that are committed to fostering a unique learning environment for their children. Some families are seeking an alternative to what they would describe as traditional public education, while others are parents of children who, for a variety of reasons, have not thrived in a classroom setting and are looking for another way to find public support for the education of their child.

The school is comprised of two independent study learning streams. One stream is traditional homeschool independent study, with an enrollment of 500 students, centered primarily in Sonoma County. This stream is comprised of wide variety of learning strategies, all of which are supported by credentialed teachers who approve the curriculum and content. The other learning stream is a Waldorf-inspired program of group instruction, with an enrollment of 170 students, centered in Marin County.

Reflections: Successes

A description of successes and/or progress based on a review of the California School Dashboard (Dashboard) and local data.

This year we continued to improve our program of assessing and identifying potential learning gaps. Staffing additions and improved training, together with additional assessment tools yielded good results this year in identifying and addressing learning deficiencies across the program. The result was earlier identification and servicing of learning deficiencies, resulting in several successful learning improvements.

Academic results remained steady this year, but showing a slight decline in math. Additional resources were applied this year to both small group learning as well as intervention in order to improve learning outcomes.

Dashboard indicators improved slightly over prior years with indicators in green or blue in all categories except math in yellow. Subgroup results were similar, with orange results in some categories. Heartwood had one math subgroup in red. Distance from Standard improved in both ELA and Math.

Reflections: Identified Need

A description of any areas that need significant improvement based on a review of Dashboard and local data, including any areas of low performance and significant performance gaps among student groups on Dashboard indicators, and any steps taken to address those areas.

In 2024-25, CAASPP scores showed results above state averages in both English Language Arts and Math. The results, though improved over prior years, are prompting us to strive for further improvements.

Parent and faculty feedback, as well as competency test data, identified a need to continue efforts to discover and address learning gaps. Again, this year, the school's own work with the students similarly showed a greater need for resources for servicing learning gaps and disabilities. For 2026-27 our plan again will be to utilize informal assessments and utilize new assessment tools more widely where possible to better identify deficiencies and to apply resources to fill gaps. New resources will be added especially in the area of learning interventions, including two new academic specialists, to aid in closing competency gaps.

Parent feedback indicates greater need for communication and feedback from parent groups, including subgroups. Despite the impression that communication had significantly improved, the school will be exploring increased forums for community feedback.

LCAP Highlights

A brief overview of the LCAP, including any key features that should be emphasized.

In response to observed and identified needs, the school intends to take several actions to improve our resources and processes for identifying and responding to learning deficiencies and disabilities.

- Make progress with a schoolwide Multi-Tiered System of Support and Response to Intervention (RTI) process to achieve a higher level of care for learning gaps and disabilities.
- Training for faculty and staff on MTSS and learning gap recognition.
- Continue teacher observation of students with needs, with prioritized small group instruction, tutoring, or other learning resources assigned to close learning gaps.
- Adding classroom assistants to create a greater level of care and support for learning difficulties, while allowing integrated learning.

- Adding dedicated specialists for both learning streams to oversee and monitor learning improvement action plans and improve academic results.

Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

Heartwood Charter has not been eligible for comprehensive support and improvement as defined by the State of California.

Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

N/A

Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

N/A

Engaging Educational Partners

A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.

Heartwood engaged in Board meetings, Parent Council meetings, Faculty Steering Committee meetings, and class and parent meetings in order to offer input opportunities to a wide stakeholder population. Weekly meetings with **faculty** and **administration** reviewed the status of learning and the student body. The **Parent Council** continued this year with bi-monthly meetings.

Consultation with individuals and parents representing the interests of students, including underserved groups, were performed by teachers in monthly progress meetings. In this program, teachers have regular one-to-one contact with families and are able to ask about specific needs as well as assess progress. These meetings occur at each learning period, or roughly monthly.

The needs expressed in these conversations (primarily concerns around access to technology, isolation / mental health, and especially additional academic support) have been addressed in various areas of the plan. Technology access is supported through distribution of computers primarily, and also hotspots are offered when requested. Isolation was addressed with expanded enrichment as well as school events and park days. Additional academic support is addressed in this Plan in the form of progressive assessments and, when indicated, additional intervention and tutoring, access to additional curriculum and small group instruction.

A summary of the feedback provided by specific educational partners.

Parents in an independent study program tend to be oriented towards an autonomous approach to learning and may not offer as much feedback as may be expected of parents at an in-person program. Feedback from teachers echoed this possibly extending into learning disabilities influenced our decision to develop a schoolwide MTSS program to identify and manage learning gaps.

Parents in our in-person program indicated a desire for greater communication and engagement, and many desired more opportunities for input as well as more presence from school leadership. Methods to offer more engagement are being considered.

The UPC population provided feedback through surveys and during approximately monthly Learning Period meetings with parents and teachers. Much of the feedback centered around learning gaps and learning difficulties experienced over the past two years. While significant resources have been applied to address these needs via the application of technology, curriculum or tutoring, avenues to receive feedback from subgroups is being explored.

The EL and foster youth populations are too small to address as groups, but greater efforts are planned in this area to include them in more targeted communication with the larger UPC group.

A description of the aspects of the LCAP that were influenced by specific input from educational partners.

Feedback from teachers was clear that the learning deficiencies and isolation was in danger of extending into learning disabilities. This influenced our decision to develop a schoolwide MTSS program to identify and manage learning gaps. Also, a plan was implemented where teachers checked student progress frequently and were able to apply for tutoring priority or additional learning funds and resources to make up for the learning deficiencies.

Goals and Actions

Goal

Goal #	Description
1	Create a highly trained and professional faculty and staff.

An explanation of why the LEA has developed this goal.

As a growing school, faculty and staff are comprised of various degrees of skill and experience. Some faculty are developing their credentials, and some may have gaps in their training backgrounds. A consistent and systematic program of training promises to create a team working together to sustain a strong curriculum and learning community.

State priorities 1 and 2

Measuring and Reporting Results

Metric	Baseline Target	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome 2025-26	Desired Outcome for 2026-27
Number of lead teachers with clear credentials	75%	84%	85%	88%	88%
Attendance at faculty meetings and mentoring sessions	90% attendance at weekly faculty or mentoring sessions	92% of teachers will attend a minimum of 30 hours of mentoring on annual basis	80% of teachers attend a minimum of 30 hours of mentoring on annual basis	90% of teachers will attend a minimum of 30 hours of mentoring on annual basis	90% of teachers will attend a minimum of 30 hours of mentoring on annual basis

Metric	Baseline Target	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome 2025-26	Desired Outcome for 2026-27
Completion of SpEd training, mandatory training, and other programmatic training	100% mandatory, 90% SPED, 60% programmatic	100% mandatory, 90% SPED, 90% programmatic	100% mandatory, 100% SPED, 90% programmatic	100% mandatory, 100% SPED, 90% programmatic	100% mandatory, 100% SPED, 90% programmatic

Actions

Action #	Title	Description	Total Funds	Contributing
1	MTSS Training	Train Faculty and staff in principles and methods of MTSS and RTI. Continue to work towards a school wide program to identify, assess and implement services for learning deficiencies	$1,956	N
1	MTSS Training	Train Faculty and staff in principles and methods of MTSS and RTI. Continue to work towards a school wide program to identify, assess and implement services for learning deficiencies	$1,044	Y
2	Assign in-house mentor for all faculty.	Assignment of a mentor colleague will provide support for newer staff or for closing skill gaps. Ongoing faculty growth will make this a priority again for the current year.	$1,304	N
2	Assign in-house mentor for all faculty.	Assignment of a mentor colleague will provide support for newer staff or for closing skill gaps. Ongoing faculty growth will make this a priority again for the current year.	$696	Y
3	Participate in programmatic training	Participation in specific academic and skills training will enhance staff competency and improve learning outcomes.	$3,130	N
3	Participate in programmatic training	Participation in specific academic and skills training will enhance staff competency and improve learning outcomes.	$1,670	Y

Goal Analysis for 2025-26

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Training and practical action of MTSS and RTI methods, where learning deficiencies were identified and addressed, was again successful. Training led to further improved identification and referrals. Additions to staffing and directed resources led to improved mitigation plans and the associated implementation.

The plans were again significantly challenged by the ongoing statewide shortage of qualified employees. Planned special education staff positions continue to be difficult to fill, stretching current staff under strain to service current students. Contract providers were employed at a greater pace to make up for staff, but parent feedback was somewhat more positive than previous years.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Funds budgeted for this Goal were exceeded this year in total, in part due to taking the opportunity to implement Orton-Gillingham training for most intervention and counselling staff.

An explanation of how effective the specific actions were in making progress toward the goal.

The emphasis of the MTSS process schoolwide MTSS resulted in increased awareness and discovery of learning difficulties among the student population.

In-house mentoring of faculty resulted in success in furthering credentialing of teaching staff.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

The emphasis on informal assessments and resultant application of additional tutoring and academic supplements will be further emphasized this year. Implementation of longitudinal assessments are expected to offer a view into student progress.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Goal

Goal #	Description
2	Create a healthy, positive, and safe school environment for both students and families.

An explanation of why the LEA has developed this goal.

To effectively educate the population we hope to serve, we are working to improve student engagement, parent involvement and the overall school climate.

State priorities 3, 5 and 6

Measuring and Reporting Results

Metric	Baseline	2023-24 Outcome	2024-25 Outcome	2025-26 Outcome	Desired Outcome for 2026-27
Attendance	94% or greater	97% of available instructional time	96% of available instructional time	Greater than 97%	96% or greater
Suspensions	Suspension rate under 2.5%	Suspension rate under 1%	Suspension rate under 1%	Suspension rate under 1% Expulsion rate under 1% Chronic absence rate under 4%	Suspension rate under 1% Expulsion rate under 1% Chronic absence rate under 4%
Parent Conferences	90% attendance at parent conferences	90% attendance at parent conferences	90% attendance at parent conferences	95% or greater attendance at parent conferences	95% or greater attendance at parent conferences
Facilities	Facilities in Good Repair	Facilities in Good Repair	Facilities in Good Repair	Meet “Good Repair” standard where applicable	Meet “Good Repair” standard where applicable
High School Graduation Rate	NA – fewer than 11 students	NA – fewer than 11 students	NA – fewer than 11 students	NA – fewer than 11 students	NA – fewer than 11 students

Actions

1	Positive behavior program to improve social, emotional and academic outcomes.	Develop and integrate enrichment and social activities to address social and emotional aspects of academic process and integrate into a schoolwide process.	$2,608	N
1	Positive behavior program to improve social, emotional and academic outcomes.	Develop and integrate enrichment and social activities to address social and emotional aspects of academic process and integrate into a schoolwide process.	$1,392	Y
2	Parent conference schedule	Create a school calendar that provides and extended window during which parent teacher conferences can take place to maximize parent participation.	$0.00	N

Goal Analysis for 2025-26

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

The school climate improved again this past year with more in person activities and a return to regularity of school events. Selected enrichment activities were maintained, including music, crafting, cooking, dance and outdoor education. School events included a full calendar of in-person school plays and events. Field trips drew parent engagement.

Group instruction programs were conducted in-person learning where possible. Parent conferences continued in-person, which continued to improve parent engagement.

Planned staff additions for literacy and math specialists were again expanded to enhance specific learning. Tutoring and small group instruction via video conference were largely attended to capacity.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Yearend 25-26 expenditures are expected to be higher than forecast at the end of last year’s LCAP due to expenditures due to informal assessments and implementation of literacy and math specialists. School events and other in-person activities, including the Homeschool play made significant improvements in climate.

An explanation of how effective the specific actions were in making progress toward the goal.

The enrichment activities and classes proved to be popular with students and parents, with mainly, but not universally, positive feedback.

In-house mentoring of faculty registered significant success in engaging and elevating faculty contributions. A faculty-led steering committee was formed and furthered the advancement of academics, learning and business processes for our independent study program.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

More emphasis towards social and emotional development is targeted to be integrated into the program in subsequent years.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Goal

Goal #	Description
3	Continue to develop targeted intervention based on multiple measures to address any observed gaps in student learning for all applicable student subgroups including unduplicated students and students with exceptional needs, whether that be English language learners, racial/ethnic groups, socioeconomically disadvantaged students, homeless or foster youth. Large number of assessments for returning students is due to a periodic review of existing student IEP's which occurred this year. State priorities 4, 7, 8.

An explanation of why the LEA has developed this goal.

Faculty observations as well as significant feedback from all partner groups indicated a need to identify and address learning deficiencies. The distribution of deficiencies throughout the school population led us to create a system of widespread monitoring and support.

Measuring and Reporting Results

Metric	2022-23 Outcome	Outcome for 2023-24	Outcome for 2024-25	Desired Outcome for 2025-26	Desired Outcome for 2026-27
CAASPP results. Note test scores lag by one school year, due to availability of results.	57% in ELA and 34% in math scored Proficient or above on Statewide CAASPP test.	47.6% of all students in ELA and 27% of all students in math scored Proficient or above on the statewide CAASPP test.	56% in ELA and 36% in math scored Proficient or above on statewide CAASPP test.	60% in ELA and 40% in math scored Proficient or above on statewide CAASPP test.	At least 65% in ELA and 45% in math, for all students, including subgroups, at every grade level will score Proficient or above on the statewide CAASPP test.

Metric	2022-23 Outcome	Outcome for 2023-24	Outcome for 2024-25	Desired Outcome for 2025-26	Desired Outcome for 2026-27
Teacher observations of student progress	Student progress was uneven during pandemic recovery year and limited data is available.	Student progress was uneven during pandemic recovery year and limited data is available.	Greater consistency of results, including significant progress in ELA.	At least 85% of all students, including subgroups, progress one grade/skill level each academic year in at least one area of concern, as evidenced assessments and student portfolios.	At least 85% of all students, including subgroups, progress one grade/skill level each academic year in at least one area of concern, as evidenced assessments and student portfolios.
Completion of SpEd training, mandatory training, and other programmatic training	100% mandatory, 95% SPED, 85% programmatic	100% mandatory, 95% SPED, 85% programmatic	100% mandatory, 100% SPED, 90% programmatic	100% mandatory, 95% SPED, 100% programmatic	100% mandatory, 95% SPED, 100% programmatic
New IEP Assessment requests for continuing students	4% of enrollment	4% of enrollment	8% of enrollment	11% of enrollment	<6% of enrollment

Actions

Action #	Title	Description	Total Funds	Contributing
1	Increasing staff for detection of learning gaps	Add Special Education staff to detect learning gaps and deficiencies	$176,719	N
1	Increasing staff for detection of learning gaps	Add Special Education staff to detect learning gaps and deficiencies	$94,281	Y
2	Instructional assistants	Addition of instructional assistants to assist with identification of learning gaps, and to support positive behavior and an inclusive learning environment	$115,221	N

Action #	Title	Description	Total Funds	Contributing
2	Instructional assistants	Addition of instructional assistants to assist with identification of learning gaps, and to support positive behavior and an inclusive learning environment	$61,471	Y
3	Increased observation	Increased teacher observation, review and oversight for special needs and disadvantaged students	$366,493	Y
4	Dedicated specialist	Maintain dedicated specialists to support learning deficiencies	$255,337	N
4	Dedicated specialist	Maintain dedicated specialists to support learning deficiencies	$136,224	Y
5	Small group instruction	Small group instruction and tutoring for students for special needs and disadvantages students	$160,574	N
5	Small group instruction	Small group instruction and tutoring for students for special needs and disadvantages students	$85,667	Y
6	Technology	Furnish Chromebooks, software and hotspots as needed for completion of academic activities	$6,000	N
6	Technology	Furnish Chromebooks, software and hotspots as needed for completion of academic activities	$4,000	Y
7	Instructional and Assessment software	Provide instructional software to disadvantaged students at no charge in order to enable completion of core academic curriculum at no cost.	$7,354	N
7	Instructional and Assessment software	Assessment software for monitoring and analysis of academic progress, including learning augmentation and learning difficulties	$4,000	Y

Goal Analysis for 2025-26

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

A number of trainings specific to addressing behavior and learning gaps were conducted this past year, including Orton Gillingham training and Zones of Regulation for behavior support, moving closer to our goal for all special education, counselors and learning support staff to be trained.

Staff augmentation was moderately successful. Special education staff was augmented through contractors due to lack of qualified candidates. Support for learning gaps was more successful via the hiring of Academic Specialists to deliver additional instruction, as well as the ACT process to deliver additional instruction and intervention for our in-person program. Redirection of staff to prioritize learning deficiencies had good success with the establishment of tutoring and group instruction programs. Free curriculum offerings were expanded this year to offer more opportunities for families to stretch their Instructional Funds. Economically disadvantaged students were given priority for tutoring and group instruction, and could also apply for special augmentation to their Instructional Funds to boost learning opportunities. Approved special augmentation plans were developed, approved and implemented under the oversight of their Certified Support Teacher.

Technology was distributed where needs were identified as required by their Certified Support Teacher.

While improving greatly, the plans were again challenged by the statewide shortage of qualified employees. Planned staff positions remain unfilled, though staff is adapting to adequately service current students. Portions of our actions were partially fulfilled and will be continued with this year's plan.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Yearend expenditures are expected to be moderately higher than forecast in last year's LCAP. Much of the intended training was progressed, with overall expenses higher than planned. Some of the staff additions were more costly than budgeted, and though they were easily managed by the overall budget, the expenses were higher than planned. The result was that expenses exceeded last year's budget.

An explanation of how effective the specific actions were in making progress toward the goal.

The increased training resulted in increased awareness and discovery of learning difficulties among the student population. The influx of new students created a strain on resources but was ultimately effective in discovering and planning paths towards resolution.

Substitution of Academic Specialists in place of Education Specialists yielded good results in serving learning gaps and individualized plans, and Academic Specialists will be employed again next year.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

For the coming 2026-27 school year, a greater emphasis will be placed on identifying and mitigating specific learning deficiencies through teacher observations and assessments, including casual assessments. This method has been used for the past two years and has yielded a great degree of success.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students for 2026-27

Projected LCFF Supplemental and/or Concentration Grants	Projected Additional LCFF Concentration Grant (15 percent)
$637,667	$ 0.00

Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
10%	0.00%	$ 0.00	10%

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

Required Descriptions

For each action being provided to an entire school, or across the entire school district or county office of education (COE), an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

For actions that will be available to the whole school, priority will be given to address the needs of low-income, EL and foster youth. These actions were all developed with the UPC population in mind and will be delivered to that population as a first priority. Budget for these actions will not be depleted without ensuring that the needs of the UPC students are addressed.

The primary goal for our actions is to make up for learning deficiencies. We believe that the additional attention we plan to focus on learning progress for our UPC students will make a significant difference in closing learning deficiencies.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

The overall plan was developed around learning deficiencies and the delivery of mitigation actions for the UPC students primarily. Some actions ae directed solely at the UPC students, and where shared, resources will be prioritized for UPC students before the general population.

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

Not applicable, this LEA does not receive Concentration Grant funds.

Staff-to-student ratios by type of school and concentration of unduplicated students	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students	NA, district reporting only	NA
Staff-to-student ratio of certificated staff providing direct services to students	NA, district reporting only	NA

LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Heartwood Charter School

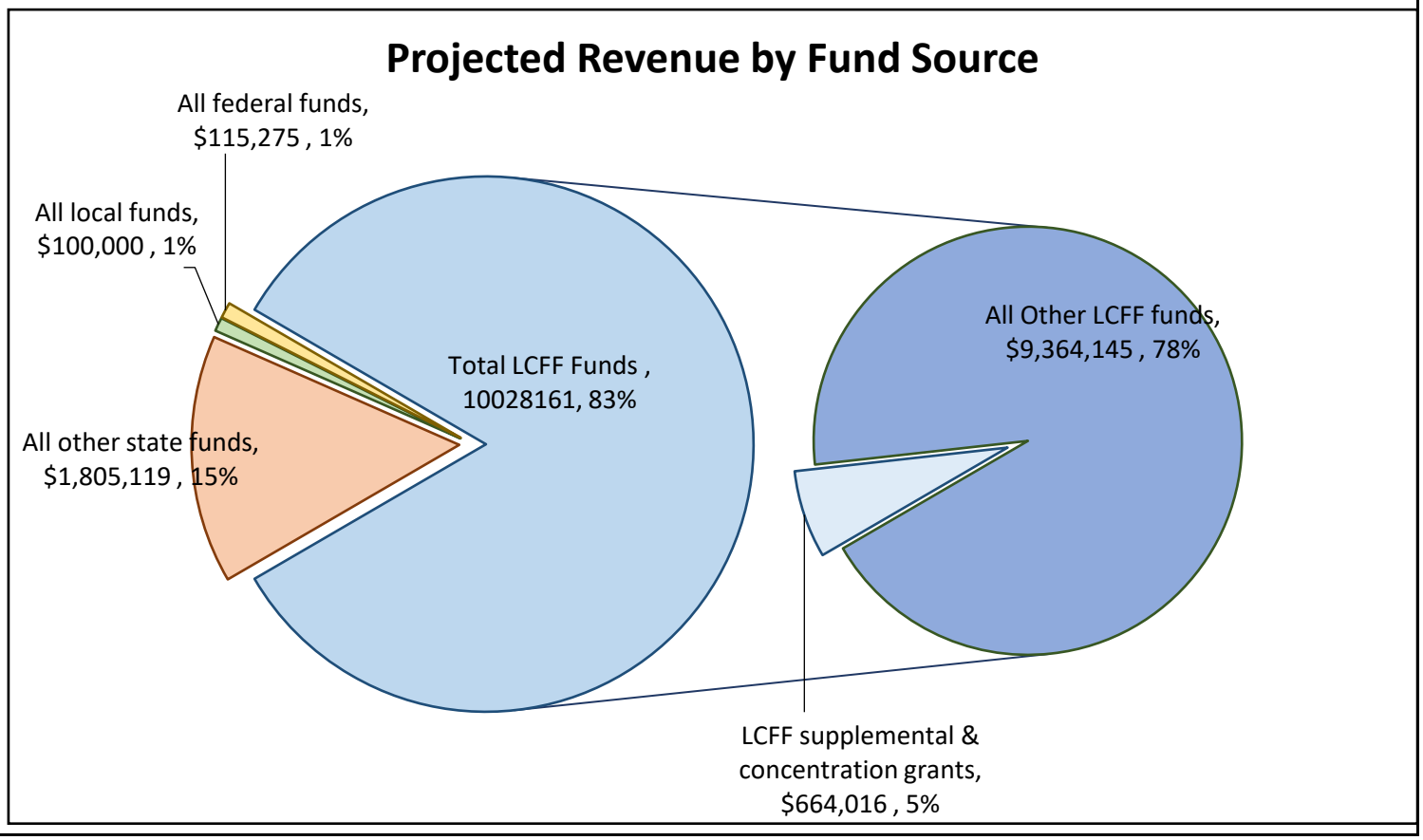
CDS Code: 49 70797 0139568

School Year: 2026-27

LEA contact information: Stephanie Felton-Priestner

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

Budget Overview for the 2026-27 School Year

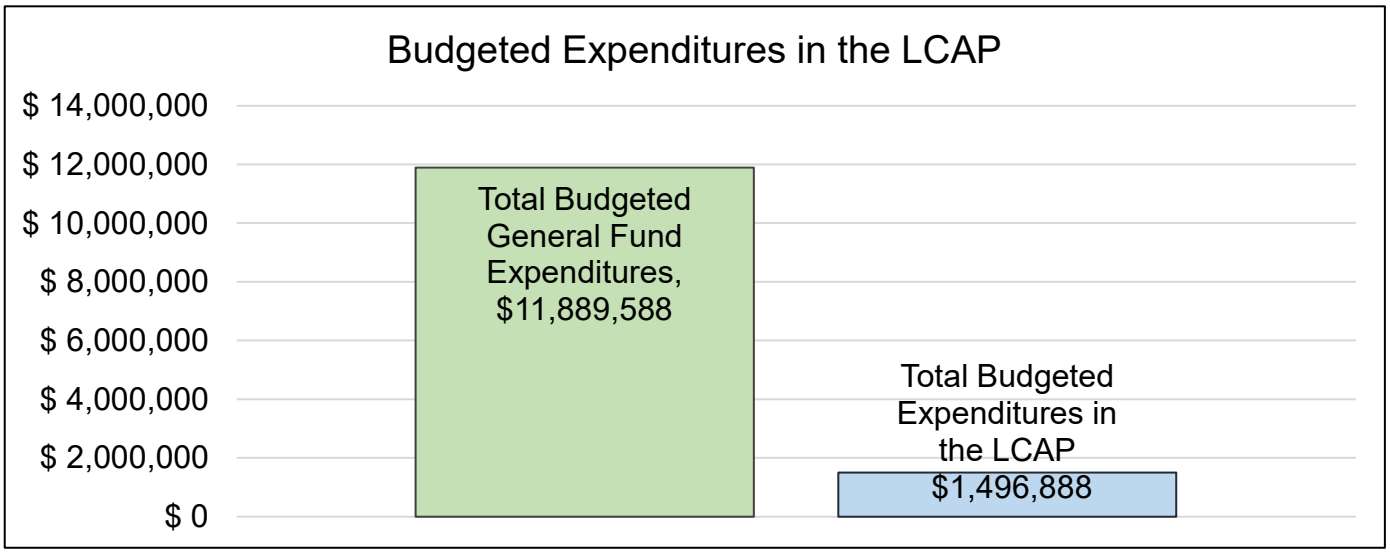


This chart shows the total general purpose revenue Heartwood Charter School expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Heartwood Charter School is $12,048,555.00, of which $10,028,161.00 is Local Control Funding Formula (LCFF), $1,805,119.00 is other state funds, $100,000.00 is local funds, and $115,275.00 is federal funds. Of the $10,028,161.00 in LCFF Funds, $664,016.00 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Heartwood Charter School plans to spend for 2026-27. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: Heartwood Charter School plans to spend $11,889,588.00 for the 2026-27 school year. Of that amount, $1,496,888.00 is tied to actions/services in the LCAP and $10,392,700.00 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

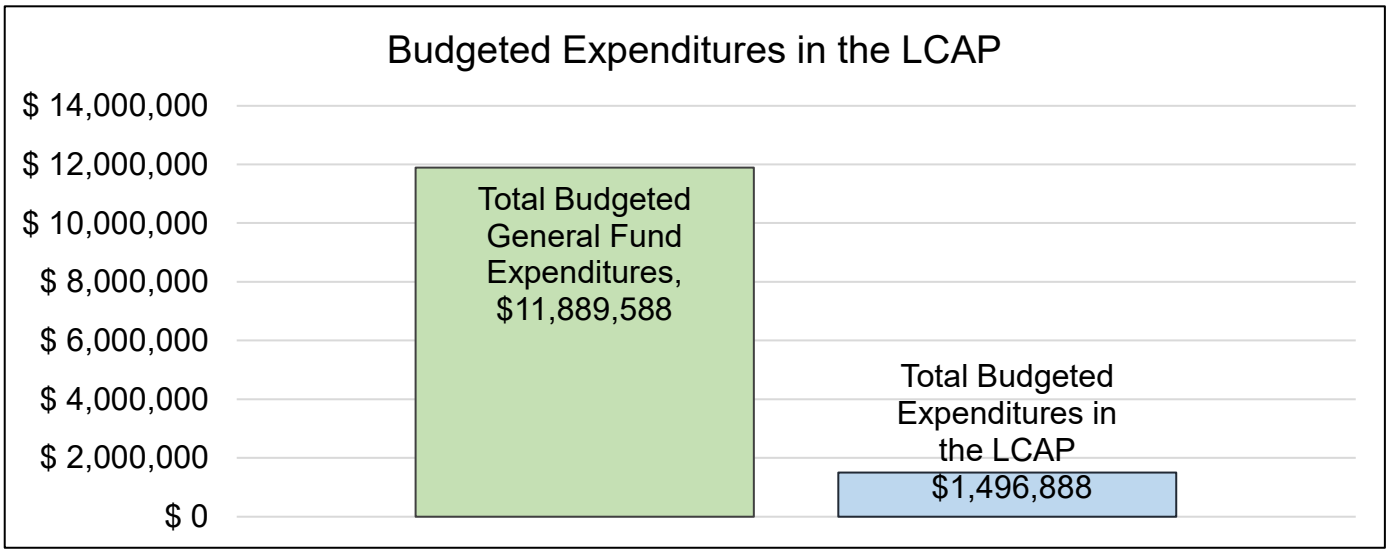
General Fund budget expenditures cover a broad spectrum of school costs, including a majority of faculty and staff salaries and benefits, Independent Study curriculum and supplies, Operating costs such as insurance, and Professional Services such as legal, accounting and audit. These are core expenditures

Increased or Improved Services for High Needs Students in the LCAP for the 2026-27 School Year

In 2026-27, Heartwood Charter School is projecting it will receive $664,016.00 based on the enrollment of foster youth, English learner, and low-income students. Heartwood Charter School must describe how it intends to increase or improve services for high needs students in the LCAP. Heartwood Charter School plans to spend $764,292.00 towards meeting this requirement, as described in the LCAP.

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



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General Fund budget expenditures cover a broad spectrum of school costs, including a majority of faculty and staff salaries and benefits, Independent Study curriculum and supplies, Operating costs such as insurance, and Professional Services such as legal, accounting and audit. These are core expenditures

Increased or Improved Services for High Needs Students in the LCAP for the 2026-27 School Year

In 2026-27, Heartwood Charter School is projecting it will receive $664,016.00 based on the enrollment of foster youth, English learner, and low-income students. Heartwood Charter School must describe how it intends to increase or improve services for high needs students in the LCAP. Heartwood Charter School plans to spend $764,292.00 towards meeting this requirement, as described in the LCAP.

2026-27 Total Planned Expenditures Table

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	$ 1,496,887	$ -	$ -	$ -	1,496,887	$ 1,453,987	$ 42,900

Goal #	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
1	1	MTSS Training for Staff	All	$ 1,956	$ -	$ -	$ -	$ 1,956
1	1	MTSS Training for Staff	Low income, foster, EL	$ 1,044	$ -	$ -	$ -	$ 1,044
1	2	Assign in-house mentor for all faculty.	All	$ 1,304	$ -	$ -	$ -	$ 1,304
1	2	Assign in-house mentor for all faculty.	Low income, foster, EL	$ 696	$ -	$ -	$ -	$ 696
1	3	Participate in programmatic training	All	$ 3,130	$ -	$ -	$ -	$ 3,130
1	3	Participate in programmatic training	Low income, foster, EL	$ 1,670	$ -	$ -	$ -	$ 1,670
				$ -	$ -	$ -	$ -	$ -
2	1	Positive behavior program to improve social, emotional and academic outcomes.	All	$ 2,608	$ -	$ -	$ -	$ 2,608
2	1	Positive behavior program to improve social, emotional and academic outcomes.	Low income, foster, EL	$ 1,392	$ -	$ -	$ -	$ 1,392
2	2	Parent conference schedule	All	$ -	$ -	$ -	$ -	$ -
				$ -	$ -	$ -	$ -	$ -
3	1	Increasing staff for detection of learning gaps	All	$ 176,719	$ -	$ -	$ -	$ 176,719
3	1	Increasing staff for detection of learning gaps	Low income, foster, EL	$ 94,281	$ -	$ -	$ -	$ 94,281
3	2	Instructional assistants	All	$ 115,221	$ -	$ -	$ -	$ 115,221
3	2	Instructional assistants	Low income, foster, EL	$ 61,471	$ -	$ -	$ -	$ 61,471
3	3	Increased observation	Low income, foster, EL	$ 366,493	$ -	$ -	$ -	$ 366,493
3	4	Dedicated specialist	All	$ 255,337	$ -	$ -	$ -	$ 255,337
3	4	Dedicated specialist	Low income, foster, EL	$ 136,224	$ -	$ -	$ -	$ 136,224
3	5	Small group instruction	All	$ 160,574	$ -	$ -	$ -	$ 160,574
3	5	Small group instruction	Low income, foster, EL	$ 85,667	$ -	$ -	$ -	$ 85,667
3	6	Technology	All	$ 6,000	$ -	$ -	$ -	$ 6,000
3	6	Technology	Low income, foster, EL	$ 4,000	$ -	$ -	$ -	$ 4,000
3	7	Instructional and assesment software	All	$ 9,746	$ -	$ -	$ -	$ 9,746
3	7	Instructional and assesment software	Low income, foster, EL	$ 7,354	$ -	$ -	$ -	$ 7,354
3	8	Additional Instructional Funds Grants	Low income, foster, EL	$ 4,000	$ -	$ -	$ -	$ 4,000
				$ -	$ -	$ -	$ -	$ -

2026-27 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)
$ 10,028,161	$ 764,292	7.62%	0.00%	7.62%	$ 764,292	0.00%	7.62%

Goal #	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)
1	1	MTSS Training for Staff	No	Schoolwide			$ -
1	1	MTSS Training for Staff	Yes	Schoolwide	All		$ 1,044
1	2	Assign in-house mentor for all faculty.	No	Schoolwide			$ -
1	2	Assign in-house mentor for all faculty.	Yes	Schoolwide	All		$ 696
1	3	Participate in programmatic training	No	Schoolwide			$ -
1	3	Participate in programmatic training	Yes	Schoolwide	All		$ 1,670
							$ -
2	1	Positive behavior program to improve social, en	No	Schoolwide			$ -
2	1	Positive behavior program to improve social, en	Yes	Schoolwide	All		$ 1,392
2	2	Parent conference schedule	No	Schoolwide			$ -
							$ -
3	1	Increasing staff for detection of learning gaps	No	Schoolwide			$ -
3	1	Increasing staff for detection of learning gaps	Yes	Schoolwide	All		$ 94,281
3	2	Instructional assistants	No	Schoolwide			$ -
3	2	Instructional assistants	Yes	Schoolwide	All		$ 61,471
3	3	Increased observation	Yes	Schoolwide	All		$ 366,493
3	4	Dedicated specialist	No	Schoolwide			$ -
3	4	Dedicated specialist	Yes	Schoolwide	All		$ 136,224
3	5	Small group instruction	No	Schoolwide			$ -
3	5	Small group instruction	Yes	Schoolwide	All		$ 85,667
3	6	Technology	No	Schoolwide			$ -
3	6	Technology	Yes	Schoolwide	All		$ 4,000
3	7	Instructional and assesment software	No	Schoolwide			$ -
3	7	Instructional and assesment software	Yes	Schoolwide	All		$ 7,354
3	8	Additional Instructional Funds Grants	Yes	Schoolwide	All		$ 4,000
							$ -

2025-26 Annual Update Table

Totals:	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Actual Expenditures (Total Funds)
Totals:	$ 1,355,286.00	$ 1,365,671.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	1	MTSS Training for Staff	No	$ 1,963	$ 7,791
1	1	MTSS Training for Staff	Yes	$ 1,037	$ 4,114
1	2	Assign in-house mentor for all faculty.	No	$ 2,290	$ 982
1	2	Assign in-house mentor for all faculty.	Yes	$ 1,210	$ 518
1	3	Participate in programmatic training	No	$ 3,141	$ 249
1	3	Participate in programmatic training	Yes	$ 1,659	$ 397
				$ -	$ -
2	1	Positive behavior program to improve social, emotional and academic outcomes.	No	$ 3,272	$ 2,487
2	1	Positive behavior program to improve social, emotional and academic outcomes.	Yes	$ 1,728	$ 1,313
2	2	Parent conference schedule	No	$ -	$ -
				$ -	$ -
3	1	Increasing staff for detection of learning gaps	No	$ 177,342	$ 89,653
3	1	Increasing staff for detection of learning gaps	Yes	$ 93,658	$ 47,347
3	2	Instructional assistants	No	$ 86,817	$ 86,988
3	2	Instructional assistants	Yes	$ 45,850	$ 30,063
3	3	Increased observation	Yes	$ 269,036	$ 338,277
3	4	Dedicated specialist	No	$ 313,841	$ 329,399
3	4	Dedicated specialist	Yes	$ 165,745	$ 173,962
3	5	Small group instruction	No	$ 103,786	$ 147,943
3	5	Small group instruction	Yes	$ 54,811	$ 78,131
3	6	Technology	No	$ 4,000	$ 9,304
3	6	Technology	Yes	$ 4,000	$ 4,841
3	7	Instructional and assesment software	No	$ 9,781	$ 5,137
3	7	Instructional and assesment software	Yes	$ 7,319	$ 2,713
3	8	Additional Instructional Funds Grants	Yes	$ 3,000	$ 4,062
				$ -	$ -

2025-26 Contributing Actions Annual Update Table

6. Estimated Actual LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Actual Percentage of Improved Services (%)	Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)
$ 580,602	$ 608,674	$ 685,463	$ (76,789)	0.00%	0.00%	0.00% - No Difference

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
1	1	MTSS Training for Staff	No	$ -	$ -	0.00%	0.00%
1	1	MTSS Training for Staff	Yes	$ 1,037	$ 4,114.00	0.00%	0.00%
1	2	Assign in-house mentor for all faculty	No	$ -	$ -	0.00%	0.00%
1	2	Assign in-house mentor for all faculty	Yes	$ 1,210	$ 518.00	0.00%	0.00%
1	3	Participate in programmatic training	No	$ -	$ -	0.00%	0.00%
1	3	Participate in programmatic training	Yes	$ 1,659	$ 132.00	0.00%	0.00%
				$ -	$ -	0.00%	0.00%
2	1	Positive behavior program to improve social, emotional and academic outcomes.	No	$ -	$ -	0.00%	0.00%
2	1	Positive behavior program to improve social, emotional and academic outcomes.	Yes	$ 1,728	$ 1,313.00	0.00%	0.00%
2	2	Parent conference schedule	No	$ -	$ -	0.00%	0.00%
				$ -	$ -	0.00%	0.00%
3	1	Increasing staff for detection of learning gaps	No	$ -	$ -	0.00%	0.00%
3	1	Increasing staff for detection of learning gaps	Yes	$ 93,658	$ 47,347.00	0.00%	0.00%
3	2	Instructional assistants	No	$ -	$ -	0.00%	0.00%
3	2	Instructional assistants	Yes	$ 45,850	$ 30,063.00	0.00%	0.00%
3	3	Increased observation	Yes	$ 269,036	$ 338,277.00	0.00%	0.00%
3	4	Dedicated specialist	No	$ -	$ -	0.00%	0.00%
3	4	Dedicated specialist	Yes	$ 125,366	$ 173,962.00	0.00%	0.00%
3	5	Small group instruction	No	$ -	$ -	0.00%	0.00%
3	5	Small group instruction	Yes	$ 54,811	$ 78,131.00	0.00%	0.00%
3	6	Technology	No	$ -	$ -	0.00%	0.00%
3	6	Technology	Yes	$ 4,000	$ 4,831.00	0.00%	0.00%
3	7	Instructional and assesment software	No	$ -	$ -	0.00%	0.00%
3	7	Instructional and assesment software	Yes	$ 7,319	$ 2,713.00	0.00%	0.00%
3	8	Additional Instructional Funds Grants	Yes	$ 3,000	$ 4,062.00	0.00%	0.00%
				$ -	$ -	0.00%	0.00%

Instructions

Plan Summary

Engaging Educational Partners

Goals and Actions

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at lcff@cde.ca.gov.

Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning (California *Education Code* [*EC*] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.

- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (*EC* Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.

- **Accountability and Compliance:** The LCAP serves an important accountability function because aspects of the LCAP template require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:

    - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (*EC* Section 52064[b][4-6]).

- Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (*EC* sections 52064[b][1] and [2]).

- Annually reviewing and updating the LCAP to reflect progress toward the goals (*EC* Section 52064[b][7]).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which should: (a) reflect comprehensive strategic planning (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in *EC* sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2021–22, 2022–23, and 2023–24 school years reflects statutory changes made through Assembly Bill 1840 (Committee on Budget), Chapter 243, Statutes of 2018. These statutory changes enhance transparency regarding expenditures on actions included in the LCAP, including actions that contribute to meeting the requirement to increase or improve services for foster youth, English learners, and low-income students, and to streamline the information presented within the LCAP to make adopted LCAPs more accessible for educational partners and the public.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

> Given present performance across the state priorities and on indicators in the California School Dashboard (Dashboard), how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions that the LEA believes, based on input gathered from educational partners, research, and experience, will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP, but may include information about effective practices when developing the LCAP and completing the LCAP itself. Additionally, information is included at the beginning of each section emphasizing the purpose that each section serves.

Plan Summary

Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to provide a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included in the subsequent sections of the LCAP.

Requirements and Instructions

General Information – Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA. For example, information about an LEA in terms of geography, enrollment, or employment, the number and size of specific schools, recent community challenges, and other such information as an LEA wishes to include can enable a reader to more fully understand an LEA's LCAP.

Reflections: Successes – Based on a review of performance on the state indicators and local performance indicators included in the Dashboard, progress toward LCAP goals, local self-assessment tools, input from educational partners, and any other information, what progress is the LEA most proud of and how does the LEA plan to maintain or build upon that success? This may include identifying specific examples of how past increases or improvements in services for foster youth, English learners, and low-income students have led to improved performance for these students.

Reflections: Identified Need – Referring to the Dashboard, identify: (a) any state indicator for which overall performance was in the "Red" or "Orange" performance category or any local indicator where the LEA received a "Not Met" or "Not Met for Two or More Years" rating AND (b) any state indicator for which performance for any student group was two or more performance levels below the "all student*"* performance. What steps is the LEA planning to take to address these areas of low performance and performance gaps? An LEA that is required to include a goal to address one or more consistently low-performing student groups or low-performing schools must identify that it is required to include this goal and must also identify the applicable student group(s) and/or school(s). Other needs may be identified using locally collected data including data collected to inform the self-reflection tools and reporting local indicators on the Dashboard.

LCAP Highlights – Identify and briefly summarize the key features of this year's LCAP.

Comprehensive Support and Improvement – An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

- **Schools Identified**: Identify the schools within the LEA that have been identified for CSI.
- **Support for Identified Schools**: Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.
- **Monitoring and Evaluating Effectiveness**: Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

Engaging Educational Partners

Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, accountability, and improvement across the state priorities and locally identified priorities (*EC* Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Statute and regulations specify the educational partners that school districts and COEs must consult when developing the LCAP: teachers, principals, administrators, other school personnel, local bargaining units of the LEA, parents, and students. Before adopting the LCAP, school districts and COEs must share it with the Parent Advisory Committee and, if applicable, to its English Learner Parent Advisory Committee. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Statute requires charter schools to consult with teachers, principals, administrators, other school personnel, parents, and students in developing the LCAP. The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals and actions.

Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the following web page of the CDE's website: https://www.cde.ca.gov/re/lc/.

Requirements and Instructions

Below is an excerpt from the 2018–19 *Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting*, which is provided to highlight the legal requirements for engagement of educational partners in the LCAP development process:

> **Local Control and Accountability Plan:**
> For county offices of education and school districts only, verify the LEA:
>
> a) Presented the local control and accountability plan to the parent advisory committee in accordance with Education Code section 52062(a)(1) or 52068(a)(1), as appropriate.
>
> b) If applicable, presented the local control and accountability plan to the English learner parent advisory committee, in accordance with Education Code section 52062(a)(2) or 52068(a)(2), as appropriate.
>
> c) Notified members of the public of the opportunity to submit comments regarding specific actions and expenditures proposed to be included in the local control and accountability plan in accordance with Education Code section 52062(a)(3) or 52068(a)(3), as appropriate.
>
> d) Held at least one public hearing in accordance with Education Code section 52062(b)(1) or 52068(b)(1), as appropriate.
>
> e) Adopted the local control and accountability plan in a public meeting in accordance with Education Code section 52062(b)(2) or 52068(b)(2), as appropriate.

Prompt 1: "A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP."

Describe the engagement process used by the LEA to involve educational partners in the development of the LCAP, including, at a minimum, describing how the LEA met its obligation to consult with all statutorily required educational partners as applicable to the type of LEA. A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA's philosophical approach to engaging its educational partners.

Prompt 2: "A summary of the feedback provided by specific educational partners."

Describe and summarize the feedback provided by specific educational partners. A sufficient response to this prompt will indicate ideas, trends, or inputs that emerged from an analysis of the feedback received from educational partners.

Prompt 3: “A description of the aspects of the LCAP that were influenced by specific input from educational partners.”

A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. The response must describe aspects of the LCAP that were influenced by or developed in response to the educational partner feedback described in response to Prompt 2. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP. For the purposes of this prompt, “aspects” of an LCAP that may have been influenced by educational partner input can include, but are not necessarily limited to:

- Inclusion of a goal or decision to pursue a Focus Goal (as described below)
- Inclusion of metrics other than the statutorily required metrics
- Determination of the desired outcome on one or more metrics
- Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
- Inclusion of action(s) or a group of actions
- Elimination of action(s) or group of actions
- Changes to the level of proposed expenditures for one or more actions
- Inclusion of action(s) as contributing to increased or improved services for unduplicated students
- Determination of effectiveness of the specific actions to achieve the goal
- Determination of material differences in expenditures
- Determination of changes made to a goal for the ensuing LCAP year based on the annual update process
- Determination of challenges or successes in the implementation of actions

Goals and Actions

Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal should be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs should consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard in determining whether and how to prioritize its goals within the LCAP.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- Focus Goal: A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.

- Broad Goal: A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.

- Maintenance of Progress Goal: A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

At a minimum, the LCAP must address all LCFF priorities and associated metrics.

Focus Goal(s)

Goal Description: The description provided for a Focus Goal must be specific, measurable, and time bound. An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach. The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

Explanation of why the LEA has developed this goal: Explain why the LEA has chosen to prioritize this goal. An explanation must be based on Dashboard data or other locally collected data. LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners. LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

Broad Goal

Goal Description: Describe what the LEA plans to achieve through the actions included in the goal. The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal. The goal description organizes the actions and expected outcomes in a cohesive and consistent manner. A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

Explanation of why the LEA has developed this goal: Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

Maintenance of Progress Goal

Goal Description: Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP. Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP. The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

Explanation of why the LEA has developed this goal: Explain how the actions will sustain the progress exemplified by the related metrics.

Required Goals

In general, LEAs have flexibility in determining what goals to include in the LCAP and what those goals will address; however, beginning with the development of the 2022–23 LCAP, LEAs that meet certain criteria are required to include a specific goal in their LCAP.

Consistently low-performing student group(s) criteria: An LEA is eligible for Differentiated Assistance for three or more consecutive years based on the performance of the same student group or groups in the Dashboard. A list of the LEAs required to include a goal in the LCAP based on student group performance, and the student group(s) that lead to identification, may be found on the CDE's Local Control Funding Formula web page at https://www.cde.ca.gov/fg/aa/lc/.

- **Consistently low-performing student group(s) goal requirement:** An LEA meeting the consistently low-performing student group(s) criteria must include a goal in its LCAP focused on improving the performance of the student group or groups that led to the LEA's eligibility for Differentiated Assistance. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, this student group or groups. An LEA required to address multiple student groups is not required to have a goal to address each student group; however, each student group must be specifically addressed in the goal. This requirement may not be met by combining this required goal with another goal.

- **Goal Description:** Describe the outcomes the LEA plans to achieve to address the needs of, and improve outcomes for, the student group or groups that led to the LEA's eligibility for Differentiated Assistance.

- **Explanation of why the LEA has developed this goal**: Explain why the LEA is required to develop this goal, including identifying the student group(s) that lead to the LEA being required to develop this goal, how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the student group(s), and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes identified in the goal description.

Low-performing school(s) criteria: The following criteria only applies to a school district or COE with two or more schools; it does not apply to a single-school district. A school district or COE has one or more schools that, for two consecutive years, received the two lowest performance levels on all but one of the state indicators for which the school(s) receive performance levels in the Dashboard and the performance of the "All Students" student group for the LEA is at least one performance level higher in all of those indicators. A list of the LEAs required to include a goal in the LCAP based on school performance, and the school(s) that lead to identification, may be found on the CDE's Local Control Funding Formula web page at https://www.cde.ca.gov/fg/aa/lc/.

- **Low-performing school(s) goal requirement:** A school district or COE meeting the low-performing school(s) criteria must include a goal in its LCAP focusing on addressing the disparities in performance between the school(s) and the LEA as a whole. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, the students enrolled at the low-performing school or schools. An LEA required to address multiple schools is not required to have a goal to address each school; however, each school must be specifically addressed in the goal. This requirement may not be met by combining this goal with another goal.

- **Goal Description:** Describe what outcomes the LEA plans to achieve to address the disparities in performance between the students enrolled at the low-performing school(s) and the students enrolled at the LEA as a whole.

- **Explanation of why the LEA has developed this goal**: Explain why the LEA is required to develop this goal, including identifying the schools(s) that lead to the LEA being required to develop this goal; how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the school(s); and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes for students enrolled at the low-performing school or schools identified in the goal description.

Measuring and Reporting Results:

For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes. LEAs are encouraged to identify metrics for specific student groups, as appropriate, including expected outcomes that would reflect narrowing of any existing performance gaps.

Include in the baseline column the most recent data associated with this metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2019 Dashboard for the baseline of a metric only if that data represents the most recent available (e.g., high school graduation rate).

Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS. Because final 2020–21 outcomes on some metrics may not be computable at the time the 2021–24 LCAP is adopted (e.g., graduation rate, suspension rate), the most recent data available may include a point in time calculation taken each year on the same date for comparability purposes.

The baseline data shall remain unchanged throughout the three-year LCAP.

Complete the table as follows:

- **Metric**: Indicate how progress is being measured using a metric.
- **Baseline**: Enter the baseline when completing the LCAP for 2021–22. As described above, the baseline is the most recent data associated with a metric. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 1 Outcome**: When completing the LCAP for 2022–23, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 2 Outcome**: When completing the LCAP for 2023–24, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 3 Outcome**: When completing the LCAP for 2024–25, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above. The 2024–25 LCAP will be the first year in the next three-year cycle. Completing this column will be part of the Annual Update for that year.
- **Desired Outcome for 2023–24**: When completing the first year of the LCAP, enter the desired outcome for the relevant metric the LEA expects to achieve by the end of the 2023–24 LCAP year.

Timeline for completing the "**Measuring and Reporting Results**" part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for Year 3 (2023–24)
Enter information in this box when completing the LCAP for **2021–22**.	Enter information in this box when completing the LCAP for **2021–22**.	Enter information in this box when completing the LCAP for **2022–23**. Leave blank until then.	Enter information in this box when completing the LCAP for **2023–24**. Leave blank until then.	Enter information in this box when completing the LCAP for **2024–25**. Leave blank until then.	Enter information in this box when completing the LCAP for **2021–22** or when adding a new metric.

The metrics may be quantitative or qualitative; but at minimum, an LEA's LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year as applicable to the type of LEA. To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant self-reflection tool for local indicators within the Dashboard.

Actions: Enter the action number. Provide a short title for the action. This title will also appear in the action tables. Provide a description of the action. Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the summary tables. Indicate whether the action contributes to meeting the increase or improved services requirement as described in the Increased or Improved Services section using a "Y" for Yes or an "N" for No. (**Note:** for each such action offered on an LEA-wide or schoolwide basis, the LEA will need to provide additional information in the Increased or Improved Summary Section to address the requirements in *California Code of Regulations*, Title 5 [5 *CCR*] Section 15496(b) in the Increased or Improved Services Section of the LCAP).

> ***Actions for English Learners:*** School districts, COEs, and charter schools that have a numerically significant English learner student subgroup must include specific actions in the LCAP related to, at a minimum, the language acquisition programs, as defined in *EC* Section 306, provided to students and professional development activities specific to English learners.
>
> ***Actions for Foster Youth***: School districts, COEs, and charter schools that have a numerically significant Foster Youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to Foster Youth students.

Goal Analysis:

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective in achieving the goal. Respond to the prompts as instructed.

- Describe the overall implementation of the actions to achieve the articulated goal. Include a discussion of relevant challenges and successes experienced with the implementation process. This must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.

- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.

- Describe the effectiveness of the specific actions to achieve the articulated goal as measured by the LEA. In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal. When responding to this prompt, LEAs

may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

Requirements and Instructions

Projected LCFF Supplemental and/or Concentration Grants: Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of low income, foster youth, and English learner students.

Projected Additional LCFF Concentration Grant (15 percent): Specify the amount of additional LCFF concentration grant add-on funding, as described in *EC* Section 42238.02, that the LEA estimates it will receive in the coming year.

***Projected Percentage to Increase or Improve Services for the Coming School Year*:** Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 *CCR* Section 15496(a)(7).

LCFF Carryover — Percentage: Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

LCFF Carryover — Dollar: Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero ($0).

Total Percentage to Increase or Improve Services for the Coming School Year: Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEAs percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 *CCR* Section 15496(a)(7).

Required Descriptions:

For each action being provided to an entire school, or across the entire school district or COE, an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

For each action included in the Goals and Actions section as contributing to the increased or improved services requirement for unduplicated pupils and provided on an LEA-wide or schoolwide basis, the LEA must include an explanation consistent with 5 *CCR* Section 15496(b). For any such actions continued into the 2021–24 LCAP from the 2017–2020 LCAP, the LEA must determine whether or not the action was effective as expected, and this determination must reflect evidence of outcome data or actual implementation to date.

Principally Directed and Effective: An LEA demonstrates how an action is principally directed towards and effective in meeting the LEA's goals for unduplicated students when the LEA explains how:

- It considers the needs, conditions, or circumstances of its unduplicated pupils;
- The action, or aspect(s) of the action (including, for example, its design, content, methods, or location), is based on these considerations; and
- The action is intended to help achieve an expected measurable outcome of the associated goal.

As such, the response provided in this section may rely on a needs assessment of unduplicated students.

Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient. Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increase or improve services standard because enrolling students is not the same as serving students.

For example, if an LEA determines that low-income students have a significantly lower attendance rate than the attendance rate for all students, it might justify LEA-wide or schoolwide actions to address this area of need in the following way:

After assessing the needs, conditions, and circumstances of our low-income students, we learned that the attendance rate of our low-income students is 7 percent lower than the attendance rate for all students. (Needs, Conditions, Circumstances [Principally Directed])

In order to address this condition of our low-income students, we will develop and implement a new attendance program that is designed to address some of the major causes of absenteeism, including lack of reliable transportation and food, as well as a school climate that does not emphasize the importance of attendance. Goal N, Actions X, Y, and Z provide additional transportation and nutritional resources as well as a districtwide educational campaign on the benefits of high attendance rates. (Contributing Action[s])

These actions are being provided on an LEA-wide basis and we expect/hope that all students with less than a 100 percent attendance rate will benefit. However, because of the significantly lower attendance rate of low-income students, and because the actions meet needs most associated with the chronic stresses and experiences of a socio-economically disadvantaged status, we expect that the attendance rate for our low-income students will increase significantly more than the average attendance rate of all other students. (Measurable Outcomes [Effective In])

COEs and Charter Schools: Describe how actions included as contributing to meeting the increased or improved services requirement on an LEA-wide basis are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above. In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

For School Districts Only:

Actions Provided on an LEA-Wide Basis:

Unduplicated Percentage > 55 percent: For school districts with an unduplicated pupil percentage of 55 percent or more, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above.

Unduplicated Percentage < 55 percent: For school districts with an unduplicated pupil percentage of less than 55 percent, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities. Also describe how the actions **are the most effective use of the funds** to meet these goals for its unduplicated pupils. Provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions Provided on a Schoolwide Basis:

School Districts must identify in the description those actions being funded and provided on a schoolwide basis, and include the required description supporting the use of the funds on a schoolwide basis.

For schools with 40 percent or more enrollment of unduplicated pupils: Describe how these actions are principally directed to and effective in meeting its goals for its unduplicated pupils in the state and any local priorities.

For school districts expending funds on a schoolwide basis at a school with less than 40 percent enrollment of unduplicated pupils: Describe how these actions are principally directed to and how the actions are the most effective use of the funds to meet its goals for foster youth, English learners, and low-income students in the state and any local priorities.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

Consistent with the requirements of 5 *CCR* Section 15496, describe how services provided for unduplicated pupils are increased or improved by at least the percentage calculated as compared to the services provided for all students in the LCAP year. To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are included in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided on an LEA-wide or schoolwide basis or provided on a limited basis to unduplicated students. A limited action is an action that only serves foster youth, English learners, and/or low-income students. This description must address how these action(s) are expected to result in the required proportional increase or improvement in services for unduplicated pupils as compared to the services the LEA provides to all students for the relevant LCAP year.

For any action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage. See the instructions for determining the Planned Percentage of Improved Services for information on calculating the Percentage of Improved Services.

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

An LEA that receives the additional concentration grant add-on described in *EC* Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.

An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.

In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of full time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.

- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

Action Tables

Complete the Data Entry Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Data Entry Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. With the exception of the Data Entry Table, the word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)
- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2022–23 LCAP, 2022–23 will be the coming LCAP Year and 2021–22 will be the current LCAP Year.

Data Entry Table

The Data Entry Table may be included in the LCAP as adopted by the local governing board or governing body, but is not required to be included. In the Data Entry Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year**: Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant**: Provide the total amount of LCFF funding the LEA estimates it will receive for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 *CCR* Section 15496(a)(8).

  See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF apportionment calculations.
- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will receive on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 *CCR* Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.

- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover — Percentage. This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.

- **Goal #**: Enter the LCAP Goal number for the action.

- **Action #**: Enter the action's number as indicated in the LCAP Goal.

- **Action Title**: Provide a title of the action.

- **Student Group(s)**: Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.

- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services.

- If "Yes" is entered into the Contributing column, then complete the following columns:

    - **Scope**: The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.

    - **Unduplicated Student Group(s)**: Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.

    - **Location**: Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate "All Schools." If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans." Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.

- **Time Span**: Enter “ongoing” if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter “1 Year,” or “2 Years,” or “6 Months.”
- **Total Personnel**: Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel**: This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.
- **LCFF Funds**: Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA’s total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
    - **Note:** For an action to contribute towards meeting the increased or improved services requirement it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds**: Enter the total amount of Other State Funds utilized to implement this action, if any.
- **Local Funds**: Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds**: Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds**: This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services**: For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
    - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

      For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which the LEA estimates would cost $165,000.

Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of $165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Service for the action.

Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the 'Contributing to Increased or Improved Services?' column will need to be checked to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses.

Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures**: Enter the total estimated actual expenditures to implement this action, if any.

Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the 'Contributing to Increased or Improved Services?' column to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.

- **Estimated Actual Expenditures for Contributing Actions**: Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.

- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).

- Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been $169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of $169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant**: Provide the total amount of LCFF funding the LEA estimates it will receive for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 *CCR* Section 15496(a)(8).

- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 *CCR* Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

Contributing Actions Table

- 4. Total Planned Contributing Expenditures (LCFF Funds)
    - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column
- 5. Total Planned Percentage of Improved Services
    - This percentage is the total of the Planned Percentage of Improved Services column
- Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)

- This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

Contributing Actions Annual Update Table

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display "Not Required."

- 6. Estimated Actual LCFF Supplemental and Concentration Grants
  - This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- 4. Total Planned Contributing Expenditures (LCFF Funds)
  - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)
- 7. Total Estimated Actual Expenditures for Contributing Actions
  - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds)
- Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)
  - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4)
- 5. Total Planned Percentage of Improved Services (%)
  - This amount is the total of the Planned Percentage of Improved Services column
- 8. Total Estimated Actual Percentage of Improved Services (%)
  - This amount is the total of the Estimated Actual Percentage of Improved Services column
- Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)

- This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8)

LCFF Carryover Table

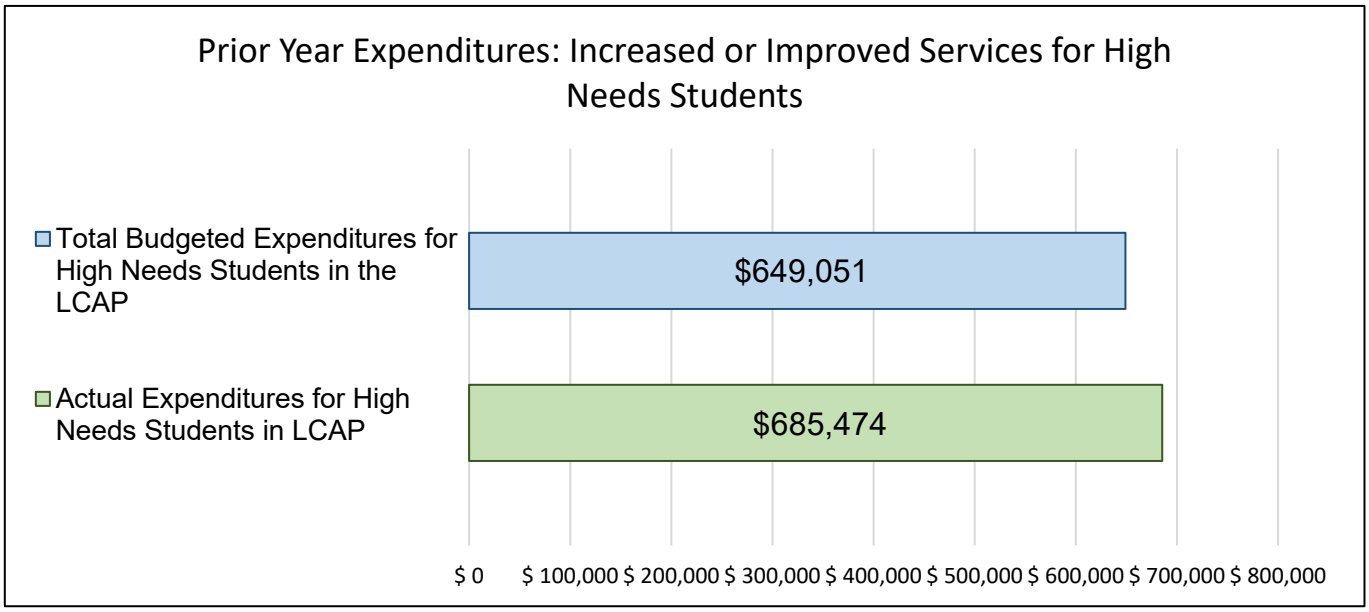
- 10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)
    - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- 11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)
    - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- 12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)
    - If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

      The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.
- 13. LCFF Carryover — Percentage (12 divided by 9)
    - This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education
January 2022

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2025-26

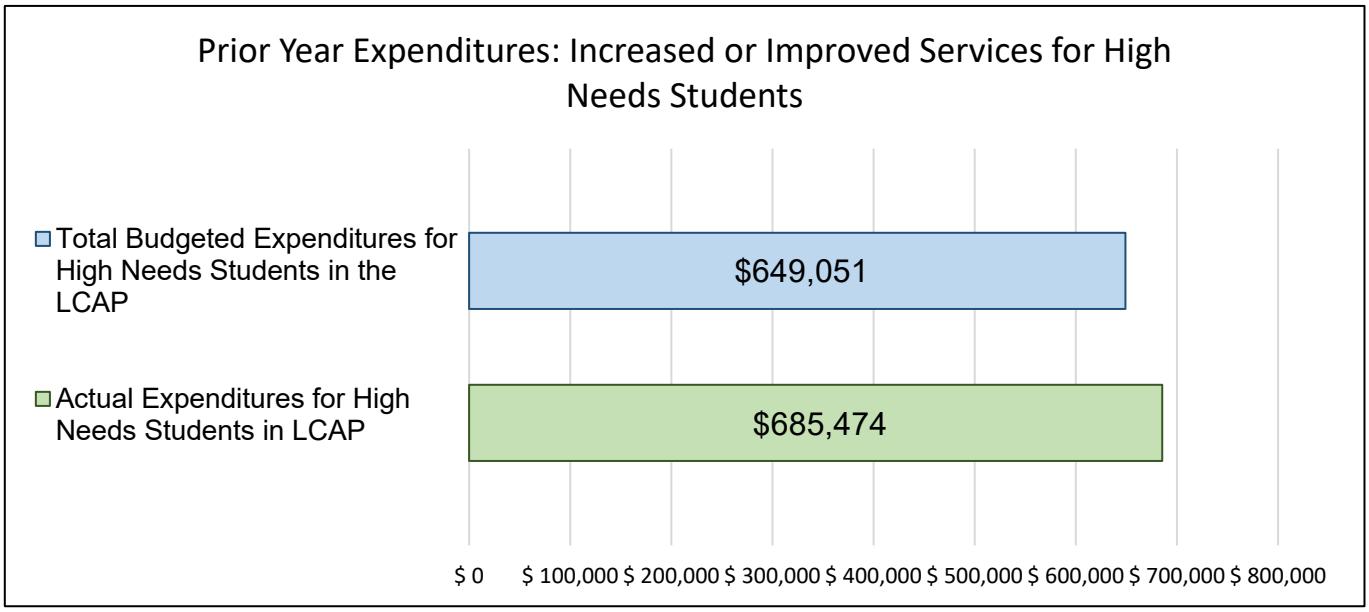


This chart compares what Heartwood Charter School budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Heartwood Charter School estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2025-26, Heartwood Charter School's LCAP budgeted $649,051.00 for planned actions to increase or improve services for high needs students. Heartwood Charter School actually spent $685,474.00 for actions to increase or improve services for high needs students in 2025-26.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2025-26



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