Election of Board officers BOARD OF DIRECTORS
NOVATO CHARTER SCHOOL
(A California Non-Profit Public Benefit Corporation)
940 C Street, Novato, CA
May 11thth,, 2022 6:00pm
REGULAR MEETING AGENDA

INSTRUCTIONS FOR PRESENTATIONS TO THE BOARD BY PARENTS AND CITIZENS

The Novato Charter School welcomes your participation at the School's Board meetings. The purpose of a public meeting of the Board of Directors ("Board") is to conduct the affairs of the School in public. We are pleased that you are in attendance and hope that you will visit these meetings often. Your participation assures us of continuing community interest in our School.

To assist you in the ease of speaking/participating in our meetings, the following guidelines are provided:

1. Agendas are available to all audience members at the door to the meeting.

2. Blue "Request to Speak" forms are available to all audience members who wish to speak on any agenda items or under the general category of "Public Comment."

3. "Public Comment" is set aside for members of the audience to raise issues that are not specifically on the agenda. However, due to public meeting laws, the Board can only listen to your issue, not respond or take action. These presentations are limited to three (3) minutes and total time allotted to non-agenda items will not exceed fifteen (15) minutes. The Board may (a) give direction to staff to respond to a concern, (b) direct that the item be referred to the Director for action or (c) schedule the item on a subsequent agenda.

4. With regard to items that are on the agenda, you may specify that agenda item on your blue request form and you will be given an opportunity to speak for up to five (5) minutes when the Board discusses that item, and total time allotted for agenda items will not exceed twenty (20) minutes.

5. When addressing the Board, speakers are requested to state their name and adhere to the time limits set forth.

Disability Access: Requests for disability-related modifications or accommodations to participate in this public meeting should be made 24 hours prior to the meeting by emailing mbloom@nusd.org. All efforts will be made for reasonable accommodations. The agenda and public documents can be modified upon request as required by Section 202 of the Americans with Disabilities Act.

BOARD MEMBER CODE OF CONDUCT

We will demonstrate **respect** for each other and all school constituents through open communication and by practicing gratitude and appreciation. We will **collaborate** by honoring each member's unique point of view when working on the common goal of supporting the mission and vision of NCS.

We will align our actions to support the faculty and staff in their endeavor to provide a **holistic/developmentally** appropriate education through **creativity and the art of teaching**. We will hold ourselves and each other accountable to arrive at Board meetings prepared and in follow-through of additional responsibilities including committee work outside of meetings.

Election of Board officers BOARD OF DIRECTORS
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BOARD MEETING CODE OF CONDUCT

We welcome the public to our Board Meetings! We request that each visitor honor the following agreements in support of our school core values:

- Maintain open, respectful body language and tone of voice when sharing viewpoints.
- Respect the Direct Communication model by bringing any concern first to the person(s) most directly connected or responsible for the topic.
- Offer full listening and attention and lend a benefit of the doubt to each member.
- Honor established agreements and limitations of the board meeting format including:
- Time limits
- Discussion limited only to agenda items (no discussion of non-agendized topics)
- Avoid interrupting others
- Stay focused on speaker and topic (do not engaging in distracting behavior/side conversations)
- Express gratitude and appreciation whenever/wherever possible.

1. Call Meeting to Order, Roll Call Craig Allender 5 Min.

Board Member	Present Absent Late	Arrival time
Craig Allender, Chair (CA)		
Erik Berkowitz, Trustee (EB)		
Bridgette Corridan, Secretary (BC)		
Lia Heath, Chief Financial Officer (LH)		
Dani Harmon, Trustee (DH)		

2. Agenda Modification Craig Allender 5 Min.

3. Public Comment Craig Allender 5 Min. *This is the opportunity for members of the community to speak on topics that are not agendized on tonight's board meeting. Because these are not agendized items the board and staff may not dialog back and forth with you. If you have a specific question that staff may be able to answer, staff may contact you. Should a board member choose to have this placed on a future meeting they may contact staff to do that*.

OPEN SESSION

Election of Board officers BOARD OF DIRECTORS
NOVATO CHARTER SCHOOL
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REGULAR MEETING AGENDA

4. Consent Agenda Items Craig Allender 5 Min.
Consent Agenda Items : All matters listed under the consent agenda are considered by the Board to be routine and will be approved/enacted by the Board in one motion in the form listed below. Unless specifically requested by a Board member for further discussion or removed from the agenda, there will be no discussion of these items prior to the Board votes on them.

A. Approve Minutes: April 13th, 2022
B. Approve IRS Form 990 and FTB Form 199

Moved By:							
Seconded By:							
Action:							

5. PUBLIC HEARING
A. Preview 2022-2023 Draft Budget
B. 2022-2023 Local Control Accountability Plan

6.Board Discussion/Action Items
A. Student Dress and Grooming Policy-*First Reading*
B. Field Trip Policy-*First Reading*
C. Staff/Student Interaction Policy-*First Reading*
D. 2022 Board Elections application reviews

CONVENE TO CLOSED SESSION

In accordance with the Brown Act, the Board may convene to closed session to discuss a narrow range of items for which the need for confidentiality takes precedence over the need for a transparent process. The public will be asked to leave the room while the Board is in closed session, and will be invited to return when the closed session has concluded. Prior to the Board convening to closed session, the public will be given the opportunity to comment on closed session agenda items. Following a closed session, there will be a report out in open session of any action taken by the Board.

1. **PUBLIC EMPLOYEE PERFORMANCE EVALUATION – Executive Director – Government Code Section 54957**

Election of Board officers BOARD OF DIRECTORS
NOVATO CHARTER SCHOOL
(A California Non-Profit Public Benefit Corporation)
940 C Street, Novato, CA
May 11thth,, 2022 6:00pm
REGULAR MEETING AGENDA

RECONVENE TO OPEN SESSION

PUBLIC REPORT ON ACTION TAKEN IN CLOSED SESSION

7. Information Items: Administrative Reports

A. COVID Update
B. Administrative Reorganization Review Task Force -Discuss Task Force Update
C. Facilities and Safety update
    a. New Portable Update
    b. NBCC Project Update

8. Next Board Meeting 5 Min. Wednesday, June 8th, 2022 at 6pm

9. Comments from Board Members -

Please email future agenda items to nlloyd@nusd.org and callender@nusd.org 5 Min.

10. Adjournment

Agenda for next meeting publicly posted on www.novatocharterschool.org by Friday, June 3rd 2022 by Megan Bloom

Election of Board officersBOARD OF DIRECTORS
NOVATO CHARTER SCHOOL
(A California Non-Profit Public Benefit Corporation)
940 C Street, Novato, CA
April 13th,, 2022 6:00pm
REGULAR MEETING AGENDA

The Novato Charter School welcomes your participation at the School's Board of Director meetings. The purpose of a public meeting is to conduct the affairs of the school in public. This meeting will be by teleconference pursuant to Executive Orders N-25-20 and N-29-20.
The Board of Directors ("Board") and employees of the Novato Charter School shall meet via the Zoom meeting platform. Members of the public who wish to access this Board meeting may do so at:
https://nusd-org.zoom.us/j/89526399900?pwd=VzBKVWFFYnp2K3Z2ZWtTWWlxNEo4Zz09

Members of the public who wish to comment during the Board meeting may use the "raise hand" tool on the Zoom platform. Members of the public calling in will be given the opportunity to address the Board during the meeting. Individual comments will be limited to three (3) minutes. If an interpreter is needed for comments, they will be translated to English and the time limit shall be six (6) minutes. The Board may limit the total time for public comment to a reasonable time. The Board reserves the right to mute or remove a participant from the meeting if the participant unreasonably disrupts the Board meeting.

As discussed in Legal Update No. 15-2021 regarding recent amendments to the Brown Act and pursuant to AB 361, local public agencies in Marin County may proceed to hold virtual meetings after September 30, 2021 without holding a separate meeting to make a determination that meeting in person would present imminent danger.

Access to Board Materials: A copy of the written materials which will be submitted to the Board may be reviewed by any interested persons on The Novato Charter School's website along with this agenda following the posting of the agenda at least 72 hours in advance of this meeting.

Disability Access: Requests for disability-related modifications or accommodations to participate in this public meeting should be made 24 hours prior to the meeting by emailing mbloom@nusd.org. All efforts will be made for reasonable accommodations. The agenda and public documents can be modified upon request as required by Section 202 of the Americans with Disabilities Act.

BOARD MEMBER CODE OF CONDUCT

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Election of Board officersBOARD OF DIRECTORS
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● Express gratitude and appreciation whenever/wherever possible.

AGENDA ITEM SPONSOR Approx. Time **1. Call Meeting to Order, Roll Call** Craig Allender 5 Min.

Board Member	Present Absent Late	Arrival time
Craig Allender, Chair (CA)	Present	6:00 pm
Erik Berkowitz, Trustee (EB)	Present	6:00 pm
Bridgette Corridan, Secretary (BC)	Present	6:00 pm
Lia Heath, Chief Financial Officer (LH)	Present	6:00 pm
Dani Harmon, Trustee (DH)	Present	6:00 pm

2. Agenda Modification Craig Allender 5 Min.
Removing Consent Agenda Item B - document has not been provided for review
Removing Agenda Item 5E - Board applications are not due until April 15, 2022 so that we will review in future meeting

3. Public Comment Craig Allender 5 Min. *This is the opportunity for members of the community to speak on topics that are not agendized on tonight's board meeting. Because these are not agendized items the board and staff may not dialog back and forth with you. If you have a specific question that staff may be able to answer, staff may contact you. Should a board member choose to have this placed on a future meeting they may contact staff to do that*.

OPEN SESSION

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REGULAR MEETING AGENDA

4. Consent Agenda Items Craig Allender 5 Min.

Consent Agenda Items : All matters listed under the consent agenda are considered by the Board to be routine and will be approved/enacted by the Board in one motion in the form listed below. Unless specifically requested by a Board member for further discussion or removed from the agenda, there will be no discussion of these items prior to the Board votes on them.

A. Approve Minutes: March 9th, 2022
~~B. Approve IRS Form 990 and FTB Form 199~~
C. Approve 2022-2023 updated Board Meeting Calendar
D. Approve Adjusted School Calendar (One change to align NCS Spring Break with NUSD Spring Break the week of April 10th through 14th, 2023)

Moved By:	Bridgette				
Seconded By:	Lia				
Action:	Erik - Y	Lia - Y	Dani - Y	Craig - Y	Bridgette - Y

5. Board Discussion/Action Items

A. Injury and Illness Prevention Program Guidance Policy. *Staff Recommendation: Approve*

Moved By:	Erik				
Seconded By:	Dani				
Action:	Erik - Y	Lia - Y	Dani - Y	Craig - Y	Bridgette - Y

B. Sale of 125 Chromebook back to company-Attached Sale And Disposal of Books, Equipment and Supplies Policy for reference. *Staff Recommendation: Approve*

Moved By:	Erik				
Seconded By:	Lia				
Action:	Erik - Y	Lia - Y	Dani - Y	Craig - Y	Bridgette - Y

C. Review 504 Policy Flow Chart
D. Approve removal of personnel name from 504 Policy Document

Moved By:	Bridgette				
Seconded By:	Lia				
Action:	Erik - Y	Lia - Y	Dani - Y	Craig - Y	Bridgette - Y

~~E. 2022 Board Elections application reviews~~

F. May BOARD MEETING - IN PERSON OR VIA ZOOM Decide whether to have the board meeting on May 11th in person or through Zoom. *Staff Recommendation: Approve* return to meeting in person due to the reduction of covid-19 in the community.

Moved By:	Lia				
Seconded By:	Bridgette				
Action:	Erik - Y	Lia - Y	Dani - Y	Craig - Y	Bridgette - Y

6. Information Items: Administrative Reports

A. NCS-NUSD School Lunch Program 22-23 MOU
   a. Nikki - Have entered an MOU and we are now in compliance with this portion of the law
B. COVID Update
   a. Nikki - County has softened the mask languaging from recommended to suggested if you have prevailing conditions. Personal choice around masks is supported across the campus.
C. LCAP - California Healthy Kids Survey Results Review
   a. Family response results review
      i. Nikki - Reviewed slide presentation - do not have comparative school data to benchmark NCS against other schools. Will bring this back to review once we have broader data from other schools across California.
   b. Student response results review
      i. Nikki - Reviewed slide presentation - do not have comparative school data to benchmark NCS against other schools. Will bring this back to review once we have broader data from other schools across California.
D. Administrative Reorganization Review Task Force -Discuss Task Force to be convened and identify two NCS BOD trustees to participate.
   a. Craig - Sub-committee to review Administrative Reorganization - no formal action items to be reviewed at this time

Election of Board officersBOARD OF DIRECTORS
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E. Facilities and Safety update
   a. New Portable Update - Craig - Scheduled to be delivered the week of June 13th. Plans are approved by the state and all items finalized for delivery. Working with YMCA + school administration to partner on successful portable installation and set up.
   b. NBCC Project Update - Craig - no new updates

CONVENE TO CLOSED SESSION

In accordance with the Brown Act, the Board may convene to closed session to discuss a narrow range of items for which the need for confidentiality takes precedence over the need for a transparent process. The public will be asked to leave the room while the Board is in closed session, and will be invited to return when the closed session has concluded. Prior to the Board convening to closed session, the public will be given the opportunity to comment on closed session agenda items. Following a closed session, there will be a report out in open session of any action taken by the Board.

1. **PUBLIC EMPLOYEE PERFORMANCE EVALUATION – Executive Director – Government Code Section 54957**

RECONVENE TO OPEN SESSION

PUBLIC REPORT ON ACTION TAKEN IN CLOSED SESSION - Craig - No formal action taken by the Board

7. Next Board Meeting 5 Min. Wednesday, May 11th, 2022 at 6pm

8. Comments from Board Members -
Please email future agenda items to nlloyd@nusd.org and callender@nusd.org 5 Min.

9. Adjournment
Agenda publicly posted on www.novatocharterschool.org by Friday, April 8th 2022 by Megan Bloom
Meeting adjourned at 8:22 pm PT

CliftonLarsonAllen LLP
CLAconnect.com

NOVATO CHARTER SCHOOL

FORM 990 INCOME TAX RETURN

FOR YEAR ENDED JUNE 30, 2021

Form **8879-EO**

IRS e-file Signature Authorization for an Exempt Organization

For calendar year 2020, or fiscal year beginning JUL 1, 2020, and ending JUN 30, 20 21

▶ **Do not send to the IRS. Keep for your records.**

▶ **Go to www.irs.gov/Form8879EO for the latest information.**

OMB No. 1545-0047

2020

Department of the Treasury
Internal Revenue Service

Name of exempt organization or person subject to tax

NOVATO CHARTER SCHOOL

Taxpayer identification number

56-2609145

Name and title of officer or person subject to tax

NIKKI LLOYD
DIRECTOR

Part I Type of Return and Return Information (Whole Dollars Only)

Check the box for the return for which you are using this Form 8879-EO and enter the applicable amount, if any, from the return. If you check the box on line **1a, 2a, 3a, 4a, 5a, 6a,** or **7a** below, and the amount on that line for the return being filed with this form was blank, then leave line **1b, 2b, 3b, 4b, 5b, 6b,** or **7b,** whichever is applicable, blank (do not enter -0-). But, if you entered -0- on the return, then enter -0- on the applicable line below. **Do not** complete more than one line in Part I.

1a Form 990 check here ▶ [X]	**b Total revenue,** if any (Form 990, Part VIII, column (A), line 12)	**1b**	2,809,404.
2a Form 990-EZ check here ▶ [ ]	**b Total revenue,** if any (Form 990-EZ, line 9)	**2b**	
3a Form 1120-POL check here ▶ [ ]	**b Total tax** (Form 1120-POL, line 22)	**3b**	
4a Form 990-PF check here ▶ [ ]	**b Tax based on investment income** (Form 990-PF, Part VI, line 5)	**4b**	
5a Form 8868 check here ▶ [ ]	**b Balance due** (Form 8868, line 3c)	**5b**	
6a Form 990-T check here ▶ [ ]	**b Total tax** (Form 990-T, Part III, line 4)	**6b**	
7a Form 4720 check here ▶ [ ]	**b Total tax** (Form 4720, Part III, line 1)	**7b**	

Part II Declaration and Signature Authorization of Officer or Person Subject to Tax

Under penalties of perjury, I declare that [X] I am an officer of the above organization or [ ] I am a person subject to tax with respect to (name of organization) _____, (EIN) _____ and that I have examined a copy of the 2020 electronic return and accompanying schedules and statements, and, to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the return to the IRS and to receive from the IRS **(a)** an acknowledgement of receipt or reason for rejection of the transmission, **(b)** the reason for any delay in processing the return or refund, and **(c)** the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the electronic return and, if applicable, the consent to electronic funds withdrawal.

PIN: check one box only

[X] I authorize CLIFTONLARSONALLEN LLP to enter my PIN 94949

ERO firm name

Enter five numbers, but do not enter all zeros

as my signature on the tax year 2020 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

[ ] As an officer or person subject to tax with respect to the organization, I will enter my PIN as my signature on the tax year 2020 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Signature of officer or person subject to tax ▶ Date ▶

Part III Certification and Authentication

ERO's EFIN/PIN. Enter your six-digit electronic filing identification number (EFIN) followed by your five-digit self-selected PIN. 95405291740

Do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2020 electronically filed return indicated above. I confirm that I am submitting this return in accordance with the requirements of **Pub. 4163,** Modernized e-File (MeF) Information for Authorized IRS *e-file* Providers for Business Returns.

ERO's signature ▶ WADE MCMULLEN, CPA Date ▶ 04/20/22

ERO Must Retain This Form - See Instructions
Do Not Submit This Form to the IRS Unless Requested To Do So

Form **990**

Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

▶ **Do not enter social security numbers on this form as it may be made public.**

▶ **Go to www.irs.gov/Form990 for instructions and the latest information.**

OMB No. 1545-0047

2020

Open to Public Inspection

A For the 2020 calendar year, or tax year beginning JUL 1, 2020 **and ending** JUN 30, 2021

B Check if applicable:
- ☐ Address change
- ☐ Name change
- ☐ Initial return
- ☐ Final return/ terminated
- ☐ Amended return
- ☐ Application pending

C Name of organization
NOVATO CHARTER SCHOOL

Doing business as

Number and street (or P.O. box if mail is not delivered to street address) 940 C STREET

Room/suite

City or town, state or province, country, and ZIP or foreign postal code NOVATO, CA 94949

D Employer identification number 56-2609145

E Telephone number 004-158-8342

G Gross receipts $ 2,809,404.

F Name and address of principal officer: NIKKI LLOYD
940 C STREET, NOVATO, CA 94949

H(a) Is this a group return for subordinates? ☐ Yes ☒ No

H(b) Are all subordinates included? ☐ Yes ☐ No

If "No," attach a list. See instructions

H(c) Group exemption number ▶

I Tax-exempt status: ☒ 501(c)(3) ☐ 501(c) ( ) ◀ (insert no.) ☐ 4947(a)(1) or ☐ 527

J Website: ▶ HTTP://WWW.NOVATOCHARTERSCHOOL.ORG/

K Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other ▶

L Year of formation: 2005 **M** State of legal domicile: CA

Part I Summary

Activities & Governance

1 Briefly describe the organization's mission or most significant activities: THE NOVATO CHARTER SCHOOL IS AN EDUCATIONAL COMMUNITY THAT IS COMMITTED TO

2 Check this box ▶ ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets.

3	Number of voting members of the governing body (Part VI, line 1a)	3	5
4	Number of independent voting members of the governing body (Part VI, line 1b)	4	5
5	Total number of individuals employed in calendar year 2020 (Part V, line 2a)	5	43
6	Total number of volunteers (estimate if necessary)	6	40
7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	0.
b	Net unrelated business taxable income from Form 990-T, Part I, line 11	7b	0.

Revenue

		Prior Year	Current Year
8	Contributions and grants (Part VIII, line 1h)	2,511,370.	2,804,147.
9	Program service revenue (Part VIII, line 2g)	0.	0.
10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	10,987.	4,435.
11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	12,393.	822.
12	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	2,534,750.	2,809,404.

Expenses

13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	0.	0.
14	Benefits paid to or for members (Part IX, column (A), line 4)	0.	0.
15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	1,794,843.	2,095,935.
16a	Professional fundraising fees (Part IX, column (A), line 11e)	0.	0.
b	Total fundraising expenses (Part IX, column (D), line 25) ▶ 0.		
17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	717,267.	490,701.
18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	2,512,110.	2,586,636.
19	Revenue less expenses. Subtract line 18 from line 12	22,640.	222,768.

Net Assets or Fund Balances

		Beginning of Current Year	End of Year
20	Total assets (Part X, line 16)	1,684,224.	1,617,117.
21	Total liabilities (Part X, line 26)	860,608.	570,733.
22	Net assets or fund balances. Subtract line 21 from line 20	823,616.	1,046,384.

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here

▶ Signature of officer — Date

▶ NIKKI LLOYD, DIRECTOR
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check if self-employed	PTIN
WADE MCMULLEN, CPA	WADE MCMULLEN, CPA	04/20/22	☐	P00541671

Firm's name ▶ CLIFTONLARSONALLEN LLP — Firm's EIN ▶ 41-0746749

Firm's address ▶ 2210 EAST ROUTE 66
GLENDORA, CA 91740 — Phone no. (626) 857-7300

May the IRS discuss this return with the preparer shown above? See instructions ☒ Yes ☐ No

SEE SCHEDULE O FOR ORGANIZATION MISSION STATEMENT CONTINUATION

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III X

1 Briefly describe the organization's mission:
THE NOVATO CHARTER SCHOOL IS AN EDUCATIONAL COMMUNITY THAT IS COMMITTED TO THE HEALTHY GROWTH AND DEVELOPMENT OF THE WHOLE CHILD. THROUGH A CURRICULUM INSPIRED BY WALDORF-METHODS, OUR TEACHERS NURTURE THROUGH THE IMAGINATION IN THE EARLY YEARS, BUILDING A FOUNDATION FOR

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ..... Yes X No
If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? ..... Yes X No
If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code:) (Expenses $ 2,133,807. including grants of $) (Revenue $ 822.)
A CHARTER SCHOOL PROVIDING EDUCATIONAL OPPORTUNITIES TO THE SURROUNDING COMMUNITY SERVING AROUND 250 STUDENTS GRADES K-8TH.

4b (Code:) (Expenses $ including grants of $) (Revenue $)

4c (Code:) (Expenses $ including grants of $) (Revenue $)

4d Other program services (Describe on Schedule O.)
(Expenses $ including grants of $) (Revenue $)

4e Total program service expenses ▶ 2,133,807.

Part IV Checklist of Required Schedules

			Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? *If "Yes," complete Schedule A*	1	X	
2	Is the organization required to complete *Schedule B, Schedule of Contributors*?	2	X	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? *If "Yes," complete Schedule C, Part I*	3		X
4	**Section 501(c)(3) organizations.** Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? *If "Yes," complete Schedule C, Part II*	4		X
5	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? *If "Yes," complete Schedule C, Part III*	5		X
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? *If "Yes," complete Schedule D, Part I*	6		X
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? *If "Yes," complete Schedule D, Part II*	7		X
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? *If "Yes," complete Schedule D, Part III*	8		X
9	Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? *If "Yes," complete Schedule D, Part IV*	9		X
10	Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? *If "Yes," complete Schedule D, Part V*	10		X
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.			
a	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? *If "Yes," complete Schedule D, Part VI*	11a	X	
b	Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VII*	11b		X
c	Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VIII*	11c		X
d	Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part IX*	11d		X
e	Did the organization report an amount for other liabilities in Part X, line 25? *If "Yes," complete Schedule D, Part X*	11e		X
f	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? *If "Yes," complete Schedule D, Part X*	11f	X	
12a	Did the organization obtain separate, independent audited financial statements for the tax year? *If "Yes," complete Schedule D, Parts XI and XII*	12a	X	
b	Was the organization included in consolidated, independent audited financial statements for the tax year? *If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional*	12b		X
13	Is the organization a school described in section 170(b)(1)(A)(ii)? *If "Yes," complete Schedule E*	13	X	
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a		X
b	Did the organization have aggregate revenues or expenses of more than $10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at $100,000 or more? *If "Yes," complete Schedule F, Parts I and IV*	14b		X
15	Did the organization report on Part IX, column (A), line 3, more than $5,000 of grants or other assistance to or for any foreign organization? *If "Yes," complete Schedule F, Parts II and IV*	15		X
16	Did the organization report on Part IX, column (A), line 3, more than $5,000 of aggregate grants or other assistance to or for foreign individuals? *If "Yes," complete Schedule F, Parts III and IV*	16		X
17	Did the organization report a total of more than $15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? *If "Yes," complete Schedule G, Part I*	17		X
18	Did the organization report more than $15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? *If "Yes," complete Schedule G, Part II*	18		X
19	Did the organization report more than $15,000 of gross income from gaming activities on Part VIII, line 9a? *If "Yes," complete Schedule G, Part III*	19		X
20a	Did the organization operate one or more hospital facilities? *If "Yes," complete Schedule H*	20a		X
b	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b		
21	Did the organization report more than $5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? *If "Yes," complete Schedule I, Parts I and II*	21		X

Part IV Checklist of Required Schedules *(continued)*

			Yes	No
22	Did the organization report more than $5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? *If "Yes," complete Schedule I, Parts I and III*	22		X
23	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? *If "Yes," complete Schedule J*	23		X
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than $100,000 as of the last day of the year, that was issued after December 31, 2002? *If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a*	24a		X
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		
25a	**Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.** Did the organization engage in an excess benefit transaction with a disqualified person during the year? *If "Yes," complete Schedule L, Part I*	25a		X
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? *If "Yes," complete Schedule L, Part I*	25b		X
26	Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? *If "Yes," complete Schedule L, Part II*	26		X
27	Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? *If "Yes," complete Schedule L, Part III*	27		X
28	Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions, for applicable filing thresholds, conditions, and exceptions):			
a	A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? *If "Yes," complete Schedule L, Part IV*	28a		X
b	A family member of any individual described in line 28a? *If "Yes," complete Schedule L, Part IV*	28b		X
c	A 35% controlled entity of one or more individuals and/or organizations described in lines 28a or 28b? *If "Yes," complete Schedule L, Part IV*	28c		X
29	Did the organization receive more than $25,000 in non-cash contributions? *If "Yes," complete Schedule M*	29		X
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? *If "Yes," complete Schedule M*	30		X
31	Did the organization liquidate, terminate, or dissolve and cease operations? *If "Yes," complete Schedule N, Part I*	31		X
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? *If "Yes," complete Schedule N, Part II*	32		X
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? *If "Yes," complete Schedule R, Part I*	33		X
34	Was the organization related to any tax-exempt or taxable entity? *If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1*	34	X	
35a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a		X
b	If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? *If "Yes," complete Schedule R, Part V, line 2*	35b		
36	**Section 501(c)(3) organizations.** Did the organization make any transfers to an exempt non-charitable related organization? *If "Yes," complete Schedule R, Part V, line 2*	36		X
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? *If "Yes," complete Schedule R, Part VI*	37		X
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? **Note:** All Form 990 filers are required to complete Schedule O	38	X	

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V ☐

				Yes	No
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable	1a	4		
b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable	1b	0		
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?			1c X	

Part V Statements Regarding Other IRS Filings and Tax Compliance *(continued)*

			Yes	No
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return **2a** 43			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	**2b**	X	
	Note: If the sum of lines 1a and 2a is greater than 250, you may be required to *e-file* (see instructions)			
3a	Did the organization have unrelated business gross income of $1,000 or more during the year?	**3a**		X
b	If "Yes," has it filed a Form 990-T for this year? *If "No" to line 3b, provide an explanation on Schedule O*	**3b**		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	**4a**		X
b	If "Yes," enter the name of the foreign country ▶ _____ See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).			
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	**5a**		X
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	**5b**		X
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?	**5c**		
6a	Does the organization have annual gross receipts that are normally greater than $100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	**6a**		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	**6b**		
7	**Organizations that may receive deductible contributions under section 170(c).**			
a	Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor?	**7a**		X
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	**7b**		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	**7c**		X
d	If "Yes," indicate the number of Forms 8282 filed during the year **7d**			
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	**7e**		X
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	**7f**		X
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	**7g**		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	**7h**		
8	**Sponsoring organizations maintaining donor advised funds.** Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	**8**		
9	**Sponsoring organizations maintaining donor advised funds.**			
a	Did the sponsoring organization make any taxable distributions under section 4966?	**9a**		
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	**9b**		
10	**Section 501(c)(7) organizations.** Enter:			
a	Initiation fees and capital contributions included on Part VIII, line 12 **10a**			
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities **10b**			
11	**Section 501(c)(12) organizations.** Enter:			
a	Gross income from members or shareholders **11a**			
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.) **11b**			
12a	**Section 4947(a)(1) non-exempt charitable trusts.** Is the organization filing Form 990 in lieu of Form 1041?	**12a**		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year **12b**			
13	**Section 501(c)(29) qualified nonprofit health insurance issuers.**			
a	Is the organization licensed to issue qualified health plans in more than one state?	**13a**		
	Note: See the instructions for additional information the organization must report on Schedule O.			
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans **13b**			
c	Enter the amount of reserves on hand **13c**			
14a	Did the organization receive any payments for indoor tanning services during the tax year?	**14a**		X
b	If "Yes," has it filed a Form 720 to report these payments? *If "No," provide an explanation on Schedule O*	**14b**		
15	Is the organization subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see instructions and file Form 4720, Schedule N.	**15**		X
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.	**16**		X

Part VI Governance, Management, and Disclosure *For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.*

Check if Schedule O contains a response or note to any line in this Part VI X

Section A. Governing Body and Management

				Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year	1a	5		
	If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.				
b	Enter the number of voting members included on line 1a, above, who are independent	1b	5		
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2			X
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?	3			X
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4			X
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	5			X
6	Did the organization have members or stockholders?	6			X
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a			X
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b			X
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:				
a	The governing body?	8a		X	
b	Each committee with authority to act on behalf of the governing body?	8b			X
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? *If "Yes," provide the names and addresses on Schedule O*	9			X

Section B. Policies *(This Section B requests information about policies not required by the Internal Revenue Code.)*

			Yes	No
10a	Did the organization have local chapters, branches, or affiliates?	10a		X
b	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	10b		
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	X	
b	Describe in Schedule O the process, if any, used by the organization to review this Form 990.			
12a	Did the organization have a written conflict of interest policy? *If "No," go to line 13*	12a	X	
b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	X	
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? *If "Yes," describe in Schedule O how this was done*	12c	X	
13	Did the organization have a written whistleblower policy?	13	X	
14	Did the organization have a written document retention and destruction policy?	14	X	
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?			
a	The organization's CEO, Executive Director, or top management official	15a	X	
b	Other officers or key employees of the organization	15b		X
	If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).			
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a		X
b	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	16b		

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed ▶ CA

18 Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.

☐ Own website ☐ Another's website ☒ Upon request ☐ Other *(explain on Schedule O)*

19 Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

20 State the name, address, and telephone number of the person who possesses the organization's books and records ▶

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Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII ☐

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than $100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than $100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than $10,000 of reportable compensation from the organization and any related organizations.

See instructions for the order in which to list the persons above.

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) NIKKI LLOYD	40.00									
DIRECTOR				X				111,573.	0.	29,698.
(2) ALEXANDRIA QUAM	1.00									
CHAIRPERSON		X		X				0.	0.	0.
(3) CRAIG ALLENDER	1.00									
CHIEF FINANCIAL OFFICER		X		X				0.	0.	0.
(4) LIA HEATH	1.00									
SECRETARY		X		X				0.	0.	0.
(5) BRIDGETTE CORRIDAN	1.00									
TRUSTEE		X						0.	0.	0.
(6) ERIK BERKOWITZ	1.00									
TRUSTEE		X						0.	0.	0.

Part VII **Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** *(continued)*

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
1b Subtotal ▶								111,573.	0.	29,698.
c Total from continuation sheets to Part VII, Section A ▶								0.	0.	0.
d Total (add lines 1b and 1c) ▶								111,573.	0.	29,698.

2 Total number of individuals (including but not limited to those listed above) who received more than $100,000 of reportable compensation from the organization ▶ 1

		Yes	No
3	Did the organization list any **former** officer, director, trustee, key employee, or highest compensated employee on line 1a? *If "Yes," complete Schedule J for such individual*		X
4	For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than $150,000? *If "Yes," complete Schedule J for such individual*		X
5	Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? *If "Yes," complete Schedule J for such person*		X

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than $100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
NONE		

2 Total number of independent contractors (including but not limited to those listed above) who received more than $100,000 of compensation from the organization ▶ 0

Part VIII Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
Contributions, Gifts, Grants and Other Similar Amounts	1a Federated campaigns	1a				
	b Membership dues	1b				
	c Fundraising events	1c				
	d Related organizations	1d	110,000.			
	e Government grants (contributions)	1e	2,694,147.			
	f All other contributions, gifts, grants, and similar amounts not included above	1f				
	g Noncash contributions included in lines 1a-1f	1g $				
	h **Total.** Add lines 1a-1f		2,804,147.			
Program Service Revenue		Business Code				
	2a					
	b					
	c					
	d					
	e					
	f All other program service revenue					
	g **Total.** Add lines 2a-2f					
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)		4,435.			4,435.
	4 Income from investment of tax-exempt bond proceeds					
	5 Royalties					
		(i) Real	(ii) Personal			
	6a Gross rents 6a					
	b Less: rental expenses 6b					
	c Rental income or (loss) 6c					
	d Net rental income or (loss)					
		(i) Securities	(ii) Other			
	7a Gross amount from sales of assets other than inventory 7a					
	b Less: cost or other basis and sales expenses 7b					
	c Gain or (loss) 7c					
	d Net gain or (loss)					
	8a Gross income from fundraising events (not including $ _____ of contributions reported on line 1c). See Part IV, line 18 8a					
	b Less: direct expenses 8b					
	c Net income or (loss) from fundraising events					
	9a Gross income from gaming activities. See Part IV, line 19 9a					
	b Less: direct expenses 9b					
	c Net income or (loss) from gaming activities					
	10a Gross sales of inventory, less returns and allowances 10a					
	b Less: cost of goods sold 10b					
	c Net income or (loss) from sales of inventory					
Miscellaneous Revenue		Business Code				
	11a OTHER REVENUE	900099	822.	822.		
	b					
	c					
	d All other revenue					
	e **Total.** Add lines 11a-11d		822.			
	12 **Total revenue.** See instructions		2,809,404.	822.	0.	4,435.

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX ☐

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	156,016.	156,016.		
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	1,492,680.	1,292,677.	200,003.	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	241,610.	198,294.	43,316.	
9 Other employee benefits	159,443.	137,073.	22,370.	
10 Payroll taxes	46,186.	31,015.	15,171.	
11 Fees for services (nonemployees):				
a Management	72,137.		72,137.	
b Legal	22,476.		22,476.	
c Accounting	36,934.		36,934.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)	61,107.	61,107.		
12 Advertising and promotion	1,229.		1,229.	
13 Office expenses	20,709.	12,736.	7,973.	
14 Information technology	14,450.	14,450.		
15 Royalties				
16 Occupancy	109,275.	109,275.		
17 Travel				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	30,312.	30,312.		
23 Insurance	14,938.		14,938.	
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a INSTRUCTIONAL MATERIAL	67,125.	67,125.		
b OTHER EXPENSES	40,009.	23,727.	16,282.	
c				
d				
e All other expenses				
25 **Total functional expenses.** Add lines 1 through 24e	2,586,636.	2,133,807.	452,829.	0.
26 **Joint costs.** Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ▶ ☐ if following SOP 98-2 (ASC 958-720)				

Part X Balance Sheet

Check if Schedule O contains a response or note to any line in this Part X ☐

				(A) Beginning of year		(B) End of year
Assets	1	Cash - non-interest-bearing		490,511.	1	388,786.
	2	Savings and temporary cash investments		521,203.	2	310,082.
	3	Pledges and grants receivable, net		245,760.	3	521,811.
	4	Accounts receivable, net			4	
	5	Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons			5	
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)			6	
	7	Notes and loans receivable, net			7	
	8	Inventories for sale or use			8	
	9	Prepaid expenses and deferred charges			9	
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 809,136.			
	b	Less: accumulated depreciation	10b 412,698.	426,750.	10c	396,438.
	11	Investments - publicly traded securities			11	
	12	Investments - other securities. See Part IV, line 11			12	
	13	Investments - program-related. See Part IV, line 11			13	
	14	Intangible assets			14	
	15	Other assets. See Part IV, line 11			15	
	16	**Total assets.** Add lines 1 through 15 (must equal line 33)		1,684,224.	16	1,617,117.
Liabilities	17	Accounts payable and accrued expenses		506,106.	17	216,231.
	18	Grants payable			18	
	19	Deferred revenue			19	
	20	Tax-exempt bond liabilities			20	
	21	Escrow or custodial account liability. Complete Part IV of Schedule D			21	
	22	Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons			22	
	23	Secured mortgages and notes payable to unrelated third parties			23	
	24	Unsecured notes and loans payable to unrelated third parties		354,502.	24	354,502.
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D			25	
	26	**Total liabilities.** Add lines 17 through 25		860,608.	26	570,733.
Net Assets or Fund Balances		**Organizations that follow FASB ASC 958, check here ▶ ☒ and complete lines 27, 28, 32, and 33.**				
	27	Net assets without donor restrictions		823,616.	27	976,952.
	28	Net assets with donor restrictions			28	69,432.
		Organizations that do not follow FASB ASC 958, check here ▶ ☐ and complete lines 29 through 33.				
	29	Capital stock or trust principal, or current funds			29	
	30	Paid-in or capital surplus, or land, building, or equipment fund			30	
	31	Retained earnings, endowment, accumulated income, or other funds			31	
	32	Total net assets or fund balances		823,616.	32	1,046,384.
	33	Total liabilities and net assets/fund balances		1,684,224.	33	1,617,117.

Form **990** (2020)

032011 12-23-20

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI ☐

1	Total revenue (must equal Part VIII, column (A), line 12)	1	2,809,404.
2	Total expenses (must equal Part IX, column (A), line 25)	2	2,586,636.
3	Revenue less expenses. Subtract line 2 from line 1	3	222,768.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	823,616.
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain on Schedule O)	9	0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	1,046,384.

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII ☐

			Yes	No
1	Accounting method used to prepare the Form 990: ☐ Cash ☒ Accrual ☐ Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis	2a		X
b	Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: ☒ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis	2b	X	
c	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.	2c		X
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	3a		X
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits	3b		

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.
▶ **Attach to Form 990 or Form 990-EZ.**
▶ **Go to www.irs.gov/Form990 for instructions and the latest information.**

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization	**Employer identification number**
NOVATO CHARTER SCHOOL	56-2609145

Part I **Reason for Public Charity Status.** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
2 ☒ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990 or 990-EZ).)
3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: _____
5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
9 ☐ An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: _____
10 ☐ An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3).** Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.

a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
f Enter the number of supported organizations .....
g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document? Yes	(iv) No	(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
Total						

Part II **Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 **Total.** Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 **Public support.** Subtract line 5 from line 4.						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 **Total support.** Add lines 7 through 10						

12 Gross receipts from related activities, etc. (see instructions) 12

13 **First 5 years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ..... ▶ ☐

Section C. Computation of Public Support Percentage

14 Public support percentage for 2020 (line 6, column (f), divided by line 11, column (f)) ..... 14 %

15 Public support percentage from 2019 Schedule A, Part II, line 14 ..... 15 %

16a **33 1/3% support test - 2020.** If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization ..... ▶ ☐

b **33 1/3% support test - 2019.** If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization ..... ▶ ☐

17a **10% -facts-and-circumstances test - 2020.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and **stop here.** Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization ..... ▶ ☐

b **10% -facts-and-circumstances test - 2019.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and **stop here.** Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization ..... ▶ ☐

18 **Private foundation.** If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ..... ▶ ☐

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 **Total.** Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of $5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 **Public support.** (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 **Total support.** (Add lines 9, 10c, 11, and 12.)						

14 **First 5 years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ▶ ☐

Section C. Computation of Public Support Percentage

15 Public support percentage for 2020 (line 8, column (f), divided by line 13, column (f))	15	%
16 Public support percentage from 2019 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for **2020** (line 10c, column (f), divided by line 13, column (f))	17	%
18 Investment income percentage from **2019** Schedule A, Part III, line 17	18	%

19a **33 1/3% support tests - 2020.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☐

b **33 1/3% support tests - 2019.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☐

20 **Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ▶ ☐

Part IV Supporting Organizations

(Complete only if you checked a box in line 12 on Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

			Yes	No
1	Are all of the organization's supported organizations listed by name in the organization's governing documents? *If "No," describe in* **Part VI** *how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.*	1		
2	Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? *If "Yes," explain in* **Part VI** *how the organization determined that the supported organization was described in section 509(a)(1) or (2).*	2		
3a	Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? *If "Yes," answer lines 3b and 3c below.*	3a		
b	Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? *If "Yes," describe in* **Part VI** *when and how the organization made the determination.*	3b		
c	Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? *If "Yes," explain in* **Part VI** *what controls the organization put in place to ensure such use.*	3c		
4a	Was any supported organization not organized in the United States ("foreign supported organization")? *If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.*	4a		
b	Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? *If "Yes," describe in* **Part VI** *how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.*	4b		
c	Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? *If "Yes," explain in* **Part VI** *what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.*	4c		
5a	Did the organization add, substitute, or remove any supported organizations during the tax year? *If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in* **Part VI,** *including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).*	5a		
b	**Type I or Type II only.** Was any added or substituted supported organization part of a class already designated in the organization's organizing document?	5b		
c	**Substitutions only.** Was the substitution the result of an event beyond the organization's control?	5c		
6	Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? *If "Yes," provide detail in* **Part VI.**	6		
7	Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? *If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).*	7		
8	Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? *If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).*	8		
9a	Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? *If "Yes," provide detail in* **Part VI.**	9a		
b	Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? *If "Yes," provide detail in* **Part VI.**	9b		
c	Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? *If "Yes," provide detail in* **Part VI.**	9c		
10a	Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? *If "Yes," answer line 10b below.*	10a		
b	Did the organization have any excess business holdings in the tax year? *(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)*	10b		

Part IV Supporting Organizations *(continued)*

			Yes	No
11	Has the organization accepted a gift or contribution from any of the following persons?			
a	A person who directly or indirectly controls, either alone or together with persons described in lines 11b and 11c below, the governing body of a supported organization?	**11a**		
b	A family member of a person described in line 11a above?	**11b**		
c	A 35% controlled entity of a person described in line 11a or 11b above? *If "Yes" to line 11a, 11b, or 11c, provide detail in* **Part VI.**	**11c**		

Section B. Type I Supporting Organizations

			Yes	No
1	Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? *If "No," describe in* **Part VI** *how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.*	**1**		
2	Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? *If "Yes," explain in* **Part VI** *how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.*	**2**		

Section C. Type II Supporting Organizations

			Yes	No
1	Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? *If "No," describe in* **Part VI** *how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).*	**1**		

Section D. All Type III Supporting Organizations

			Yes	No
1	Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?	**1**		
2	Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? *If "No," explain in* **Part VI** *how the organization maintained a close and continuous working relationship with the supported organization(s).*	**2**		
3	By reason of the relationship described in line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? *If "Yes," describe in* **Part VI** *the role the organization's supported organizations played in this regard.*	**3**		

Section E. Type III Functionally Integrated Supporting Organizations

1 *Check the box next to the method that the organization used to satisfy the Integral Part Test during the year* **(see instructions).**

- **a** ☐ The organization satisfied the Activities Test. *Complete* **line 2** *below.*
- **b** ☐ The organization is the parent of each of its supported organizations. *Complete* **line 3** *below.*
- **c** ☐ The organization supported a governmental entity. *Describe in* **Part VI** *how you supported a governmental entity (see instructions).*

			Yes	No
2	Activities Test. **Answer lines 2a and 2b below.**			
a	Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? *If "Yes," then in* **Part VI identify those supported organizations and explain** *how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.*	**2a**		
b	Did the activities described in line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? *If "Yes," explain in* **Part VI** *the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.*	**2b**		
3	Parent of Supported Organizations. **Answer lines 3a and 3b below.**			
a	Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? *If "Yes" or "No" provide details in* **Part VI.**	**3a**		
b	Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? *If "Yes," describe in* **Part VI** *the role played by the organization in this regard.*	**3b**		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (*explain in* **Part VI**). **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1 Net short-term capital gain	**1**		
2 Recoveries of prior-year distributions	**2**		
3 Other gross income (see instructions)	**3**		
4 Add lines 1 through 3.	**4**		
5 Depreciation and depletion	**5**		
6 Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	**6**		
7 Other expenses (see instructions)	**7**		
8 **Adjusted Net Income** (subtract lines 5, 6, and 7 from line 4)	**8**		

Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1 Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):			
a Average monthly value of securities	**1a**		
b Average monthly cash balances	**1b**		
c Fair market value of other non-exempt-use assets	**1c**		
d **Total** (add lines 1a, 1b, and 1c)	**1d**		
e **Discount** claimed for blockage or other factors (*explain in detail in* **Part VI**):			
2 Acquisition indebtedness applicable to non-exempt-use assets	**2**		
3 Subtract line 2 from line 1d.	**3**		
4 Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	**4**		
5 Net value of non-exempt-use assets (subtract line 4 from line 3)	**5**		
6 Multiply line 5 by 0.035.	**6**		
7 Recoveries of prior-year distributions	**7**		
8 **Minimum Asset Amount** (add line 7 to line 6)	**8**		

Section C - Distributable Amount		Current Year
1 Adjusted net income for prior year (from Section A, line 8, column A)	**1**	
2 Enter 0.85 of line 1.	**2**	
3 Minimum asset amount for prior year (from Section B, line 8, column A)	**3**	
4 Enter greater of line 2 or line 3.	**4**	
5 Income tax imposed in prior year	**5**	
6 **Distributable Amount.** Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	**6**	

7 ☐ Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations *(continued)*

Section D - Distributions		Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes	1	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	3	
4 Amounts paid to acquire exempt-use assets	4	
5 Qualified set-aside amounts (prior IRS approval required - *provide details in* **Part VI**)	5	
6 Other distributions (*describe in* **Part VI**). See instructions.	6	
7 **Total annual distributions.** Add lines 1 through 6.	7	
8 Distributions to attentive supported organizations to which the organization is responsive (*provide details in* **Part VI**). See instructions.	8	
9 Distributable amount for 2020 from Section C, line 6	9	
10 Line 8 amount divided by line 9 amount	10	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2020	(iii) Distributable Amount for 2020
1 Distributable amount for 2020 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2020 (reasonable cause required - *explain in* **Part VI**). See instructions.			
3 Excess distributions carryover, if any, to 2020			
a From 2015			
b From 2016			
c From 2017			
d From 2018			
e From 2019			
f **Total** of lines 3a through 3e			
g Applied to underdistributions of prior years			
h Applied to 2020 distributable amount			
i Carryover from 2015 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2020 from Section D, line 7: $			
a Applied to underdistributions of prior years			
b Applied to 2020 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2020, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, *explain in* **Part VI.** See instructions.			
6 Remaining underdistributions for 2020. Subtract lines 3h and 4b from line 1. For result greater than zero, *explain in* **Part VI**. See instructions.			
7 **Excess distributions carryover to 2021.** Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2016			
b Excess from 2017			
c Excess from 2018			
d Excess from 2019			
e Excess from 2020			

Part VI **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ **Attach to Form 990, Form 990-EZ, or Form 990-PF.**
▶ **Go to www.irs.gov/Form990 for the latest information.**

OMB No. 1545-0047

2020

Name of the organization

NOVATO CHARTER SCHOOL

Employer identification number

56-2609145

Organization type (check one):

Filers of:	**Section:**
Form 990 or 990-EZ	☒ 501(c)(3) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☐ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling $5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling $5,000 or more during the year ..... ▶ $ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization

NOVATO CHARTER SCHOOL

Employer identification number

56-2609145

Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	NOVATO CHARTER SHCOOL FOUNDATION 940 C STREET NOVATO, CA 94949	$ 110,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)

Name of organization: NOVATO CHARTER SCHOOL

Employer identification number: 56-2609145

Part II Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

Name of organization

NOVATO CHARTER SCHOOL

Employer identification number

56-2609145

Part III **Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than $1,000 for the year from any one contributor.** Complete columns **(a)** through **(e) and** the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of **$1,000 or less** for the year. (Enter this info. once.) ▶ $

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

SCHEDULE D (Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.
▶ Attach to Form 990.
▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization
NOVATO CHARTER SCHOOL

Employer identification number
56-2609145

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.

Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

		(a) Donor advised funds	(b) Funds and other accounts
1	Total number at end of year		
2	Aggregate value of contributions to (during year)		
3	Aggregate value of grants from (during year)		
4	Aggregate value at end of year		

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☐ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? ☐ Yes ☐ No

Part II Conservation Easements.

Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

☐ Preservation of land for public use (for example, recreation or education)
☐ Preservation of a historically important land area
☐ Protection of natural habitat
☐ Preservation of a certified historic structure
☐ Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

			Held at the End of the Tax Year
a	Total number of conservation easements	2a	
b	Total acreage restricted by conservation easements	2b	
c	Number of conservation easements on a certified historic structure included in (a)	2c	
d	Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register	2d	

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ _____

4 Number of states where property subject to conservation easement is located ▶ _____

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ _____

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ $ _____

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenue included on Form 990, Part VIII, line 1 ▶ $ _____

(ii) Assets included in Form 990, Part X ▶ $ _____

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

a Revenue included on Form 990, Part VIII, line 1 ▶ $ _____

b Assets included in Form 990, Part X ▶ $ _____

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets *(continued)*

3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply):

a ☐ Public exhibition
b ☐ Scholarly research
c ☐ Preservation for future generations
d ☐ Loan or exchange program
e ☐ Other _____

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

Part IV Escrow and Custodial Arrangements. Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII and complete the following table:

		Amount
c Beginning balance	1c	
d Additions during the year	1d	
e Distributions during the year	1e	
f Ending balance	1f	

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII ☐

Part V Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

a Board designated or quasi-endowment ▶ _____%
b Permanent endowment ▶ _____%
c Term endowment ▶ _____%

The percentages on lines 2a, 2b, and 2c should equal 100%.

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

		Yes	No
(i) Unrelated organizations	3a(i)		
(ii) Related organizations	3a(ii)		
b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R?	3b		

4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings		809,136.	412,698.	396,438.
c Leasehold improvements				
d Equipment				
e Other				
Total. Add lines 1a through 1e. *(Column (d) must equal Form 990, Part X, column (B), line 10c.)* ▶				396,438.

Schedule D (Form 990) 2020

Part VII Investments - Other Securities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely held equity interests		
(3) Other		
(A)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.) ▶		

Part VIII Investments - Program Related.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.) ▶		

Part IX Other Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. *(Column (b) must equal Form 990, Part X, col. (B) line 15.)* ▶	

Part X Other Liabilities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. *(Column (b) must equal Form 990, Part X, col. (B) line 25.)* ▶	

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII ... X

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements			1	2,809,404.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:				
a	Net unrealized gains (losses) on investments	2a			
b	Donated services and use of facilities	2b			
c	Recoveries of prior year grants	2c			
d	Other (Describe in Part XIII.)	2d			
e	Add lines **2a** through **2d**			2e	0.
3	Subtract line **2e** from line **1**			3	2,809,404.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a			
b	Other (Describe in Part XIII.)	4b			
c	Add lines **4a** and **4b**			4c	0.
5	Total revenue. Add lines **3** and **4c.** *(This must equal Form 990, Part I, line 12.)*			5	2,809,404.

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements			1	2,586,636.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:				
a	Donated services and use of facilities	2a			
b	Prior year adjustments	2b			
c	Other losses	2c			
d	Other (Describe in Part XIII.)	2d			
e	Add lines **2a** through **2d**			2e	0.
3	Subtract line **2e** from line **1**			3	2,586,636.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a			
b	Other (Describe in Part XIII.)	4b			
c	Add lines **4a** and **4b**			4c	0.
5	Total expenses. Add lines **3** and **4c.** *(This must equal Form 990, Part I, line 18.)*			5	2,586,636.

Part XIII Supplemental Information.

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

PART X, LINE 2:

THE SCHOOL IS A NONPROFIT ENTITY EXEMPT FROM THE PAYMENT OF INCOME TAXES UNDER INTERNAL REVENUE CODE SECTION 501(C)(3) AND CALIFORNIA REVENUE AND TAXATION CODE SECTION 23701D. ACCORDINGLY, NO PROVISION HAS BEEN MADE FOR INCOME TAXES. MANAGEMENT HAS DETERMINED THAT ALL INCOME TAX POSITIONS ARE MORE LIKELY THAN NOT OF BEING SUSTAINED UPON POTENTIAL AUDIT OR EXAMINATION; THEREFORE, NO DISCLOSURES OF UNCERTAIN INCOME TAX POSITIONS ARE REQUIRED. THE SCHOOL IS SUBJECT TO INCOME TAX ON NET INCOME THAT IS DERIVED FROM BUSINESS ACTIVITIES THAT ARE UNRELATED TO THE EXEMPT PURPOSES. THE SCHOOL FILES AND EXEMPT SCHOOL RETURN AND APPLICABLE UNRELATED BUSINESS INCOME TAX RETURN IN THE U.S. FEDERAL JURISDICTION AND WITH THE CALIFORNIA FRANCHISE TAX BOARD.

Part XIII Supplemental Information *(continued)*

SCHEDULE E
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Schools

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 13, or Form 990-EZ, Part VI, line 48.**
▶ **Attach to Form 990 or Form 990-EZ.**
▶ **Go to www.irs.gov/Form990 for the latest information.**

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization
NOVATO CHARTER SCHOOL

Employer identification number
56-2609145

Part I

			YES	NO
1	Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body?	1	X	
2	Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships?	2	X	
3	Has the organization publicized its racially nondiscriminatory policy on its primary publicly accessible Internet homepage at all times during its taxable year in a manner reasonably expected to be noticed by visitors to the homepage, or through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If "Yes," please describe. If "No," please explain. If you need more space, use Part II	3	X	
	NOVATO MAKES ITS NONDISCRIMINATORY POLICY KNOWN THROUGH ITS WEBSITE AND ON THE STUDENT'S APPLICATION. NOVATO DRAWS ITS STUDENTS FROM THE LOCAL COMMUNITY, AND CURRENTLY ENROLLS STUDENTS FROM VARIOUS RACIAL MINORITY GROUPS.			
4	Does the organization maintain the following?			
a	Records indicating the racial composition of the student body, faculty, and administrative staff?	4a	X	
b	Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis?	4b		X
c	Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships?	4c	X	
d	Copies of all material used by the organization or on its behalf to solicit contributions?	4d	X	
	If you answered "No" to any of the above, please explain. If you need more space, use Part II.			
	NOVATO CHARTER IS A PUBLIC SCHOOL THAT IS FREE TO ATTEND. THEY DO NOT PROVIDE ANY SCHOLARSHIPS OR OTHER FINANCIAL ASSISTANCE.			
5	Does the organization discriminate by race in any way with respect to:			
a	Students' rights or privileges?	5a		X
b	Admissions policies?	5b		X
c	Employment of faculty or administrative staff?	5c		X
d	Scholarships or other financial assistance?	5d		X
e	Educational policies?	5e		X
f	Use of facilities?	5f		X
g	Athletic programs?	5g		X
h	Other extracurricular activities?	5h		X
	If you answered "Yes" to any of the above, please explain. If you need more space, use Part II.			
6a	Does the organization receive any financial aid or assistance from a governmental agency?	6a	X	
b	Has the organization's right to such aid ever been revoked or suspended?	6b		X
	If you answered "Yes" on either line 6a or line 6b, explain on Part II.			
7	Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev. Proc. 75-50, 1975-2 C.B. 587, covering racial nondiscrimination? If "No," explain on Part II	7	X	

Part II **Supplemental Information.** Provide the explanations required by Part I, lines 3, 4d, 5h, 6b, and 7, as applicable. Also provide any other additional information.

LINE 6 - EXPLANATION OF GOVERNMENT FINANCIAL AID:

AS A PUBLIC CHARTER SCHOOL, NOVATO CHARTER RECEIVES A PER ADA FEE FROM THE CALIFORNIA DEPARTMENT OF EDUCATION FOR EVERY PUPIL ATTENDING THE SCHOOL. ADDITIONALLY, NOVATO CHATER IS ELIGIBLE FOR LOCAL, STATE, AND FEDERAL PROGRAMS, AND CALIFORNIA LOTTERY FUNDS.

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.
▶ Attach to Form 990 or 990-EZ.
▶ Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization
NOVATO CHARTER SCHOOL

Employer identification number
56-2609145

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

THE HEALTHY GROWTH AND DEVELOPMENT OF THE WHOLE CHILD. THROUGH A CURRICULUM INSPIRED BY WALDORF-METHODS, OUR TEACHERS NURTURE THROUGH THE IMAGINATION IN THE EARLY YEARS, BUILDING A FOUNDATION FOR ABSTRACT THINKING, GRADUALLY AND APPROPRIATELY CHALLENGING THE INTELLECT THROUGHOUT THE GRADES. THIS PHILOSOPHY PLACES EQUAL EMPHASIS ON A SOLID ACADEMIC PROGRAM, ARTISTIC EXPRESSION, SOCIAL DEVELOPMENT AND ATTENTION TO THE INNER LIFE AND NATURAL RHYTHMS OF THE CHILD.

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

ABSTRACT THINKING, GRADUALLY AND APPROPRIATELY CHALLENGING THE INTELLECT THROUGHOUT THE GRADES. THIS PHILOSOPHY PLACES EQUAL EMPHASIS ON A SOLID ACADEMIC PROGRAM, ARTISTIC EXPRESSION, SOCIAL DEVELOPMENT AND ATTENTION TO THE INNER LIFE AND NATURAL RHYTHMS OF THE CHILD.

FORM 990, PART VI, SECTION A, LINE 8B:

THERE ARE NO COMMITTEES WITH THE AUTHORITY TO ACT ON BEHALF OF THE BOARD.

FORM 990, PART VI, SECTION B, LINE 11B:

THE 990 RETURN IS INITIALLY REVIEWED BY MANAGEMENT AND THEN REVIEWED BY THE BOARD PRIOR TO FILING THE RETURN.

FORM 990, PART VI, SECTION B, LINE 12C:

IN CONNECTION WITH ANY ACTUAL OR POSSIBLE CONFLICT OF INTEREST, AN INTERESTED PERSON MUST DISCLOSE THE EXISTENCE OF THE FINANCIAL INTEREST AND BE GIVEN THE OPPORTUNITY TO DISCLOSE ALL MATERIAL FACTS TO THE DIRECTORS

Name of the organization: NOVATO CHARTER SCHOOL

Employer identification number: 56-2609145

AND MEMBERS OF COMMITTEES CONSIDERING THE PROPOSED TRANSACTION OR ARRANGEMENT. AFTER DISCLOSURE OF THE FINANCIAL INTEREST AND ALL MATERIAL FACT, AND AFTER ANY DISCUSSION WITH THE INTERESTED PERSON, HE/SHE SHALL LEAVE THE BOARD OF DIRECTORS MEETING WHILE THE DETERMINATION OF A CONFLICT OF INTEREST IS DISCUSSED AND VOTED UPON. THE REMAINING BOARD MEMBERS SHALL DECIDE IF A CONFLICT OF INTEREST EXISTS.

FORM 990, PART VI, SECTION B, LINE 15A:

THE BOARD REVIEWS AND APPROVES THE SALARY OF THE EXECUTIVE DIRECTOR AT A BOARD MEETING. THIS PROCESS IS INCLUDED IN THE DISCUSSIONS FOR APPROVING THE ANNUAL BUDGET. THE BOARD DETERMINES THE EXECUTIVE DIRECTOR'S SALARY BY COMPARING IT TO SIMILAR POSITIONS WITHIN THE GEOGRAPHIC LOCATION OF THE SCHOOL.

FORM 990, PART VI, SECTION C, LINE 19:

THE SCHOOL PROVIDES ITS GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY AND FINANCIAL STATEMENTS TO THE PUBLIC UPON REQUEST.

SCHEDULE R (Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.

▶ Attach to Form 990.

▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization

NOVATO CHARTER SCHOOL

Employer identification number

56-2609145

Part I **Identification of Disregarded Entities.** Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity

Part II **Identification of Related Tax-Exempt Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related tax-exempt organizations during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity? Yes	(g) Section 512(b)(13) controlled entity? No
NOVATO CHARTER SCHOOL FOUNDATION - 68-0470644, 940 C STREET, NOVATO, CA 94949	SUPPORT NOVATO CHARTER SCHOOL	CALIFORNIA	501(C)(3)	LINE 12A, I	N/A		X

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule R (Form 990) 2020

032161 10-28-20 LHA

Part III **Identification of Related Organizations Taxable as a Partnership.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a partnership during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations? Yes	(h) No	(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner? Yes	(j) No	(k) Percentage ownership

Part IV **Identification of Related Organizations Taxable as a Corporation or Trust.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a corporation or trust during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 512(b)(13) controlled entity? Yes	(i) No

Part V **Transactions With Related Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

		Yes	No
Note: Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.			
1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?			
a Receipt of **(i)** interest, **(ii)** annuities, **(iii)** royalties, or **(iv)** rent from a controlled entity	1a		X
b Gift, grant, or capital contribution to related organization(s)	1b		X
c Gift, grant, or capital contribution from related organization(s)	1c	X	
d Loans or loan guarantees to or for related organization(s)	1d		X
e Loans or loan guarantees by related organization(s)	1e		X
f Dividends from related organization(s)	1f		X
g Sale of assets to related organization(s)	1g		X
h Purchase of assets from related organization(s)	1h		X
i Exchange of assets with related organization(s)	1i		X
j Lease of facilities, equipment, or other assets to related organization(s)	1j		X
k Lease of facilities, equipment, or other assets from related organization(s)	1k		X
l Performance of services or membership or fundraising solicitations for related organization(s)	1l		X
m Performance of services or membership or fundraising solicitations by related organization(s)	1m		X
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	1n		X
o Sharing of paid employees with related organization(s)	1o		X
p Reimbursement paid to related organization(s) for expenses	1p		X
q Reimbursement paid by related organization(s) for expenses	1q		X
r Other transfer of cash or property to related organization(s)	1r		X
s Other transfer of cash or property from related organization(s)	1s		X

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

	(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1)				
(2)				
(3)				
(4)				
(5)				
(6)				

Part VI **Unrelated Organizations Taxable as a Partnership.** Complete if the organization answered "Yes" on Form 990, Part IV, line 37.

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

(a) Name, address, and EIN of entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(e) Are all partners sec. 501(c)(3) orgs.? Yes	(e) No	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations? Yes	(h) No	(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner? Yes	(j) No	(k) Percentage ownership

Part VII Supplemental Information

Provide additional information for responses to questions on Schedule R. See instructions.

TAXABLE YEAR **2020**

California Exempt Organization Annual Information Return

028941 12-22-20
FORM **199**

Calendar Year 2020 or fiscal year beginning (mm/dd/yyyy) 07/01/2020 , and ending (mm/dd/yyyy) 06/30/2021 .

Corporation/Organization name: NOVATO CHARTER SCHOOL

California corporation number: 2863435

Additional information. See instructions.

FEIN: 56-2609145

Street address (suite or room): 940 C STREET

PMB no.:

City: NOVATO

State: CA

ZIP code: 94949

Foreign country name | Foreign province/state/county | Foreign postal code

A First return ..... ☐ Yes ☒ No

B Amended return ..... ● ☐ Yes ☒ No

C IRC Section 4947(a)(1) trust ..... ☐ Yes ☒ No

D Final information return?
● ☐ Dissolved ☐ Surrendered (Withdrawn) ☐ Merged/Reorganized
Enter date: (mm/dd/yyyy) ● _____

E Check accounting method: (1) ☐ Cash (2) ☒ Accrual (3) ☐ Other

F Federal return filed? (1) ● ☐ 990T (2) ● ☐ 990PF (3) ● ☐ Sch H (990)
(4) ☒ Other 990 series

G Is this a group filing? See instructions ..... ● ☐ Yes ☒ No

H Is this organization in a group exemption ..... ☐ Yes ☒ No
If "Yes," what is the parent's name?

I Did the organization have any changes to its guidelines not reported to the FTB? See instructions ..... ● ☐ Yes ☒ No

J If exempt under R&TC Section 23701d, has the organization engaged in political activities? See instructions. ..... ● ☐ Yes ☒ No

K Is the organization exempt under R&TC Section 23701g? ● ☐ Yes ☒ No
If "Yes," enter the gross receipts from nonmember sources $ _____

L Is the organization a limited liability company? ..... ● ☐ Yes ☒ No

M Did the organization file Form 100 or Form 109 to report taxable income? ..... ● ☐ Yes ☒ No

N Is the organization under audit by the IRS or has the IRS audited in a prior year? ..... ● ☐ Yes ☒ No

O Is federal Form 1023/1024 pending? ..... ☐ Yes ☒ No
Date filed with IRS _____

Part I Complete Part I unless not required to file this form. See General Information B and C.

Receipts and Revenues	1	Gross sales or receipts from other sources. From Side 2, Part II, line 8 ●	1	5,257	00
	2	Gross dues and assessments from members and affiliates ●	2		00
	3	Gross contributions, gifts, grants, and similar amounts received STMT 1 ●	3	2,804,147	00
	4	Total gross receipts for filing requirement test. Add line 1 through line 3. **This line must be completed.** If the result is less than $50,000, see General Information B ●	4	2,809,404	00
	5	Cost of goods sold ● 5 00			
	6	Cost or other basis, and sales expenses of assets sold ● 6 00			
	7	Total costs. Add line 5 and line 6	7		00
	8	Total gross income. Subtract line 7 from line 4 ●	8	2,809,404	00
Expenses	9	Total expenses and disbursements. From Side 2, Part II, line 18 ●	9	2,586,636	00
	10	Excess of receipts over expenses and disbursements. Subtract line 9 from line 8 ●	10	222,768	00
Filing Fee	11	Total payments ●	11		00
	12	Use tax. See General Information K ●	12		00
	13	Payments balance. If line 11 is more than line 12, subtract line 12 from line 11 ●	13		00
	14	Use tax balance. If line 12 is more than line 11, subtract line 11 from line 12 ●	14		00
	15	Penalties and Interest. See General Information J	15		00
	16	**Balance due.** Add line 12 and line 15. Then subtract line 11 from the result ◉	16		00

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer ▶ | Title: DIRECTOR | Date | ● Telephone: 707-824-9700

Paid Preparer's Use Only

Preparer's signature ▶ WADE MCMULLEN, CPA | Date: 04/20/22 | Check if self-employed ▶ ☐ | ● PTIN: P00541671

Firm's name (or yours, if self-employed) and address ▶ CLIFTONLARSONALLEN LLP
2210 EAST ROUTE 66
GLENDORA, CA 91740

● Firm's FEIN: 41-0746749

● Telephone: (626) 857-7300

May the FTB discuss this return with the preparer shown above? See instructions ..... ● ☒ Yes ☐ No

Part II **Organizations with gross receipts of more than $50,000 and private foundations regardless of amount of gross receipts - complete Part II or furnish substitute information.**

	1	Gross sales or receipts from all business activities. See instructions	1		00
	2	Interest	2	4,435	00
	3	Dividends	3		00
Receipts	4	Gross rents	4		00
from	5	Gross royalties	5		00
Other	6	Gross amount received from sale of assets (See Instructions)	6		00
Sources	7	Other income SEE STATEMENT 2	7	822	00
	8	**Total** gross sales or receipts from other sources. Add line 1 through line 7. Enter here and on Side 1, Part I, line 1	8	5,257	00
	9	Contributions, gifts, grants, and similar amounts paid	9		00
	10	Disbursements to or for members	10		00
	11	Compensation of officers, directors, and trustees SEE STATEMENT 3	11	156,016	00
	12	Other salaries and wages	12	1,492,680	00
Expenses	13	Interest	13		00
and	14	Taxes	14	46,186	00
Disburse-	15	Rents	15	109,275	00
ments	16	Depreciation and depletion (See instructions)	16	30,312	00
	17	Other expenses and disbursements SEE STATEMENT 4	17	752,167	00
	18	**Total** expenses and disbursements. Add line 9 through line 17. Enter here and on Side 1, Part I, line 9	18	2,586,636	00

Schedule L **Balance Sheet**

Assets	Beginning of taxable year (a)	Beginning of taxable year (b)	End of taxable year (c)	End of taxable year (d)
1 Cash		1,011,714		698,868
2 Net accounts receivable				
3 Net notes receivable				
4 Inventories				
5 Federal and state government obligations				
6 Investments in other bonds				
7 Investments in stock				
8 Mortgage loans				
9 Other investments				
10 a Depreciable assets	809,136		809,136	
b Less accumulated depreciation	(382,386)	426,750	(412,698)	396,438
11 Land				
12 Other assets STMT 5		245,760		521,811
13 **Total assets**		1,684,224		1,617,117
Liabilities and net worth				
14 Accounts payable		506,106		216,231
15 Contributions, gifts, or grants payable				
16 Bonds and notes payable				
17 Mortgages payable				
18 Other liabilities STMT 6		354,502		354,502
19 Capital stock or principal fund				
20 Paid-in or capital surplus. Attach reconciliation				
21 Retained earnings or income fund		823,616		1,046,384
22 **Total liabilities and net worth**		1,684,224		1,617,117

Schedule M-1 **Reconciliation of income per books with income per return**

Do not complete this schedule if the amount on Schedule L, line 13, column (d), is less than $50,000.

1 Net income per books	222,768	7 Income recorded on books this year not included in this return	
2 Federal income tax		8 Deductions in this return not charged against book income this year	
3 Excess of capital losses over capital gains		9 Total. Add line 7 and line 8	
4 Income not recorded on books this year		10 Net income per return. Subtract line 9 from line 6	222,768
5 Expenses recorded on books this year not deducted in this return			
6 Total. Add line 1 through line 5	222,768		

CA 199 CASH CONTRIBUTIONS INCLUDED ON PART I, LINE 3 STATEMENT 1

CONTRIBUTOR'S NAME	CONTRIBUTOR'S ADDRESS	DATE OF GIFT	AMOUNT
NOVATO CHARTER SHCOOL FOUNDATION	940 C STREET NOVATO, CA 94949		110,000.
TOTAL INCLUDED ON LINE 3			110,000.

CA 199 OTHER INCOME STATEMENT 2

DESCRIPTION	AMOUNT
OTHER REVENUE	822.
TOTAL TO FORM 199, PART II, LINE 7	822.

CA 199 COMPENSATION OF OFFICERS, DIRECTORS AND TRUSTEES STATEMENT 3

NAME AND ADDRESS	TITLE AND AVERAGE HRS WORKED/WK	COMPENSATION
NIKKI LLOYD 940 C STREET NOVATO, CA 94949	DIRECTOR 40.00	156,016.
ALEXANDRIA QUAM 940 C STREET NOVATO, CA 94949	CHAIRPERSON 1.00	0.
CRAIG ALLENDER 940 C STREET NOVATO, CA 94949	CHIEF FINANCIAL OFFICER 1.00	0.
LIA HEATH 940 C STREET NOVATO, CA 94949	SECRETARY 1.00	0.
BRIDGETTE CORRIDAN 940 C STREET NOVATO, CA 94949	TRUSTEE 1.00	0.
ERIK BERKOWITZ 940 C STREET NOVATO, CA 94949	TRUSTEE 1.00	0.
TOTAL TO FORM 199, PART II, LINE 11		156,016.

CA 199 OTHER EXPENSES STATEMENT 4

DESCRIPTION	AMOUNT
INSTRUCTIONAL MATERIAL	67,125.
OTHER EXPENSES	40,009.
PENSION PLAN CONTRIBUTIONS	241,610.
OTHER EMPLOYEE BENEFITS	159,443.
MANAGEMENT FEES	72,137.
LEGAL FEES	22,476.
ACCOUNTING FEES	36,934.
OTHER PROFESSIONAL FEES	61,107.
ADVERTISING AND PROMOTION	1,229.
OFFICE EXPENSES	20,709.
INFORMATION TECHNOLOGY	14,450.
INSURANCE	14,938.
TOTAL TO FORM 199, PART II, LINE 17	752,167.

CA 199 OTHER ASSETS STATEMENT 5

DESCRIPTION	BEG. OF YEAR	END OF YEAR
PLEDGES AND GRANTS RECEIVABLE	245,760.	521,811.
TOTAL TO FORM 199, SCHEDULE L, LINE 12	245,760.	521,811.

CA 199 OTHER LIABILITIES STATEMENT 6

DESCRIPTION	BEG. OF YEAR	END OF YEAR
UNSECURED NOTES AND LOANS PAYABLE	354,502.	354,502.
TOTAL TO FORM 199, SCHEDULE L, LINE 18	354,502.	354,502.

CA 199 FUND BALANCES STATEMENT 7

DESCRIPTION	BEG. OF YEAR	END OF YEAR
NET ASSETS WITHOUT DONOR RESTRICTIONS	823,616.	976,952.
NET ASSETS WITH DONOR RESTRICTIONS	0.	69,432.
TOTAL TO FORM 199, SCHEDULE L, LINE 21	823,616.	1,046,384.

022

Date Accepted _____

DO NOT MAIL THIS FORM TO THE FTB

TAXABLE YEAR **2020**

California e-file Return Authorization for Exempt Organizations

FORM **8453-EO**

Exempt Organization name	Identifying number
NOVATO CHARTER SCHOOL	56-2609145

Part I Electronic Return Information (whole dollars only)

1	Total gross receipts (Form 199, line 4)	1	2,809,404
2	Total gross income (Form 199, line 8)	2	2,809,404
3	Total expenses and disbursements (Form 199, line 9)	3	2,586,636

Part II Settle Your Account Electronically for Taxable Year 2020

4 ☐ Electronic funds withdrawal **4a** Amount **4b** Withdrawal date (mm/dd/yyyy)

Part III Banking Information (Have you verified the exempt organization's banking information?)

5 Routing number _____

6 Account number **7** Type of account: ☐ Checking ☐ Savings

Part IV Declaration of Officer

I authorize the exempt organization's account to be settled as designated in Part II. If I check Part II, Box 4, I authorize an electronic funds withdrawal for the amount listed on line 4a.

Under penalties of perjury, I declare that I am an officer of the above exempt organization and that the information I provided to my electronic return originator (ERO), transmitter, or intermediate service provider and the amounts in Part I above agree with the amounts on the corresponding lines of the exempt organization's 2020 California electronic return. To the best of my knowledge and belief, the exempt organization's return is true, correct, and complete. If the exempt organization is filing a balance due return, I understand that if the Franchise Tax Board (FTB) does not receive full and timely payment of the exempt organization's fee liability, the exempt organization will remain liable for the fee liability and all applicable interest and penalties. I authorize the exempt organization return and accompanying schedules and statements be transmitted to the FTB by the ERO, transmitter, or intermediate service provider. **If the processing of the exempt organization's return or refund is delayed, I authorize the FTB to disclose to the ERO or intermediate service provider the reason(s) for the delay.**

Sign Here ▶ _____ (Signature of officer) _____ (Date) ▶ DIRECTOR (Title)

Part V Declaration of Electronic Return Originator (ERO) and Paid Preparer.

I declare that I have reviewed the above exempt organization's return and that the entries on form FTB 8453-EO are complete and correct to the best of my knowledge. (If I am only an intermediate service provider, I understand that I am not responsible for reviewing the exempt organization's return. I declare, however, that form FTB 8453-EO accurately reflects the data on the return.) I have obtained the organization officer's signature on form FTB 8453-EO before transmitting this return to the FTB; I have provided the organization officer with a copy of all forms and information that I will file with the FTB, and I have followed all other requirements described in FTB Pub. 1345, 2020 Handbook for Authorized e-file Providers. I will keep form FTB 8453-EO on file for **four** years from the due date of the return or **four** years from the date the exempt organization return is filed, whichever is later, and I will make a copy available to the FTB upon request. If I am also the paid preparer, under penalties of perjury, I declare that I have examined the above exempt organization's return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. I make this declaration based on all information of which I have knowledge.

ERO Must Sign

ERO's signature ▶ WADE MCMULLEN, CPA | Date | Check if also paid preparer [X] | Check if self-employed [ ] | ERO's PTIN P00541671

Firm's name (or yours if self-employed) and address ▶ CLIFTONLARSONALLEN LLP, 2210 EAST ROUTE 66, GLENDORA, CA | Firm's FEIN 41-0746749 | ZIP code 91740

Under penalties of perjury, I declare that I have examined the above organization's return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. I make this declaration based on all information of which I have knowledge.

Paid Preparer Must Sign

Paid preparer's signature ▶ | Date | Check if self-employed [ ] | Paid preparer's PTIN

Firm's name (or yours if self-employed) and address ▶ | Firm's FEIN | ZIP code

For Privacy Notice, get FTB 1131 ENG/SP. FTB 8453-EO 2020

029021 11-19-20

NOVATO CHARTER SCHOOL
940 "C" Street, Novato, CA 94949
Ph: 415-883-4254 | Fax: 415-883-1859
www.novatocharterschool.org

TO
NCS Board of Directors

FROM
Nikki Lloyd, Executive Director

DATE
5/9/2022

RE
Review and Approved Board Policy for NCS Student Dress and Grooming

Board Priority/Goal
1. Student and Staff Success

Objective
To approve NCS Board Policy for Student Dress and Grooming

Background
In the fall of 2021 NCS joined NUSD in reviewing current Student Dress and Grooming policies. A team of NCS 7th and 8th Graders joined a committee composed of NUSD middle and high school students and led by a community partner and NUSD administrative staff. They met from November until May and sought feedback from peers, staff and parents. They created questions to be used on the ThoughtExchange platform to survey students, staff and parents to solicit feedback and solidify their recommendation on a new Dress and Grooming Policy.

Funding Source/Cost
N/A

Recommendation
NCS faculty and staff recommend that NCS Board of Directors, in alignment with NUSD, adopts the proposed Student Dress and Grooming Policy to ensure equity and consistency for students and families across public schools in Novato.

Supporting Documents
NCS proposed Dress and Grooming Policy
NCS former Dress Code Policy

NOVATO CHARTER SCHOOL
940 "C" Street, Novato, CA 94949
Ph: 415-883-4254 | Fax: 415-883-1859
www.novatocharterschool.org

Student Dress and Grooming Policy

CSBA NOTE: The following policy may be revised to reflect school practice. Pursuant to Education Code 35183, schools that adopt a school uniform policy are mandated to include specified provisions; see section on "Uniforms" below.

The Governing Board believes that appropriate dress and grooming contribute to a productive learning environment. The Board expects students to wear clothing that is suitable for the school activities in which they participate. Students shall not wear clothing that presents a health or safety hazard or causes a substantial disruption to the educational program.

School rules pertaining to student attire shall be posted in school offices and classrooms, and shall be periodically reviewed with all students as necessary.

Students shall not be prohibited from dressing in a manner consistent with their gender identity or gender expression or with their religious or cultural observance.

CSBA NOTE: Education Code 212.1, as amended by SB 188 (Ch. 58, Statutes of 2019), defines "race," for purposes of prohibiting discrimination, as including traits historically associated with race, such as hair texture and protective hairstyles.

In addition, the dress code shall not discriminate against students based on hair texture and protective hairstyles, including, but not limited to, braids, locks, and twists. (Education Code 212.1)

CSBA NOTE: While students do not lose their constitutional rights by virtue of entering school grounds, numerous court decisions have found that the First Amendment rights of public school students are not necessarily the same as the rights of adults in other settings and must be viewed in light of the special circumstances of the school environment. In Hazelwood School District v. Kuhlmeier, the U.S. Supreme Court ruled that a school may limit student expression as long as its decision is reasonably related to "legitimate pedagogical concerns." For instance, districts may prohibit clothing that is vulgar or causes a substantial disruption to the educational program. Districts may also prohibit clothing that promotes drug use. While districts can regulate clothing that causes a "substantial disruption," districts cannot regulate student clothing simply because the district does not approve of the message displayed. The district's ability to prohibit "hate

speech," including clothing with derogatory or demeaning messages, is unclear. The 9th Circuit Court in Harper v. Poway Unified School District ruled that a school could prohibit a student from wearing a t-shirt with a religious viewpoint against homosexuality, citing a provision in Tinker v. Des Moines which held that schools may prohibit speech that "intrudes upon the rights of other students" and interferes with their learning. However, because the student had graduated, the U.S. Supreme Court vacated the Harper decision on appeal and thus its analysis cannot be relied upon. It is recommended that the district consult legal counsel in the development of this policy and whenever it has questions about the appropriate enforcement of this policy based on student expression.

The director or designee is authorized to enforce this policy and shall inform any student who does not reasonably comply with the dress code. The dress code shall not be enforced in a manner that discriminates against a particular viewpoint or results in a disproportionate application of the dress code based on students' gender, sexual orientation, race, ethnicity, household income, or body type or size.

School administrators, teachers, and other staff shall be notified of the dress and grooming policies and regulations.

When practical, students shall not be directed to correct a dress code violation during instructional time or in front of other students.

Repeated violations or refusal to comply with the district's dress code may result in disciplinary action.

Gang-Related Apparel

CSBA NOTE: Education Code 35183 authorizes the Governing Board to approve a site-initiated plan that prohibits the school's students from wearing gang-related apparel. The definition of "gang-related apparel" must be limited to apparel that reasonably could be determined to threaten the health and safety of the school environment, and the Board's approval must be based on a determination the policy is necessary for the health and safety of the school environment. In Marvin H. Jeglin et al v. San Jacinto Unified School District et al, a federal district court held that in order to justify a gang-related dress code, there must be evidence of a gang presence at a school and actual or threatened disruption or material interference with school activity. Education Code 32282 specifies that for the purpose of establishing a schoolwide dress code, gang-related apparel shall not be considered a protected form of speech pursuant to Education Code 48950.

District policy should not include a districtwide prohibition against wearing gang-related apparel. Pursuant to Education Code 35183, such a dress code must be initiated at the school-site level and apply only to the school where it is initiated.

The administrators, staff, and parents/guardians at a school may establish a reasonable dress code that prohibits students from wearing gang-related apparel when there is evidence of a gang presence that disrupts or threatens to disrupt the school's activities. Such a proposed dress code shall be presented to the Board, which shall approve the plan upon determining that it is necessary to protect the health and safety of the school environment. The dress code policy may be included in the school's comprehensive safety plan. (Education Code 35183)

When determining specific items of clothing that may be defined as gang apparel, the school shall ensure that the determination is free from bias based on race, ethnicity, national origin, immigration status, or other protected characteristics.

CSBA NOTE: The following optional administrative regulation should be revised to reflect district practice.

In cooperation with teachers, students, and parents/guardians, the principal or designee may establish school rules governing student dress and grooming which are consistent with law, Board policy, and administrative regulations. These school dress codes shall be regularly reviewed.

CSBA NOTE: Optional items #1-4 below may be revised to reflect school practice.

The following guidelines shall apply to all regular school activities:

1. Clothing, jewelry, and personal items shall be free of writing, pictures, or any other insignia which is vulgar, lewd, obscene, profane, discriminatory or sexually suggestive or which promotes the use of alcohol, drugs, tobacco, or other illegal activity.

2. Shoes must be worn at all times. For grades TK -7, shoes must be closed toe. For Grade 8, open toe shoes may be worn as long as closed toe shoes, are worn for all movement activities.

3. Hoods on sweatshirts and jackets shall not be worn indoors.

4. Clothes shall conceal undergarments.

The dress code shall be modified as appropriate to accommodate a student's religious or cultural observance, health condition, or other circumstance deemed necessary by the director or designee. In addition, the director or designee may impose dress requirements to accommodate the needs of special school activities, physical education classes, athletic activities, and other extracurricular and cocurricular activities.

No grade of a student participating in a physical education class shall be adversely affected if the student does not wear standardized physical education apparel because of circumstances beyond the student's control. (Education Code 49066)

Students shall be allowed to wear sun-protective clothing, including but not limited to hats, for outdoor use during the school day. (Education Code 35183.5)

The administration, staff, students and parent/guardians at each school may establish reasonable dress and grooming regulations for times when students are engaged in extracurricular or other school activities.

Gang-Related Apparel

CSBA NOTE: The following section is for use by districts in which individual schools have adopted a dress code prohibiting gang-related apparel pursuant to Education Code 35183. It is recommended that districts consult legal counsel when developing administrative regulations related to gang apparel.

At individual schools that have a dress code prohibiting gang-related apparel at school or school activities, the principal, staff, and parents/guardians participating in the development of the school safety plan shall define "gang-related apparel" and shall limit this definition to apparel that reasonably could be determined to threaten the health and safety of the school environment if it were worn or displayed on a school campus. (Education Code 32282)

Because gang-related symbols are constantly changing, definitions of gang-related apparel shall be reviewed at least once each semester and updated whenever related information is received. As necessary, the school shall collaborate with law enforcement agencies to update definitions of gang-related apparel.

Participating students:

Adrian Wilson
Walt Novosardian
Ellie Fisher
Jaya Hugand
Kimberly Perez
Imeloa Santosa
Lola Christo
Rio Linder
Eliyah Berkowitz
Liliana Delgado
Aidyn Clark

Novato Unified School District Dress Code Policy

Recommendations presented by Novato Unified School District & Novato Charter School Students

May 10, 2022

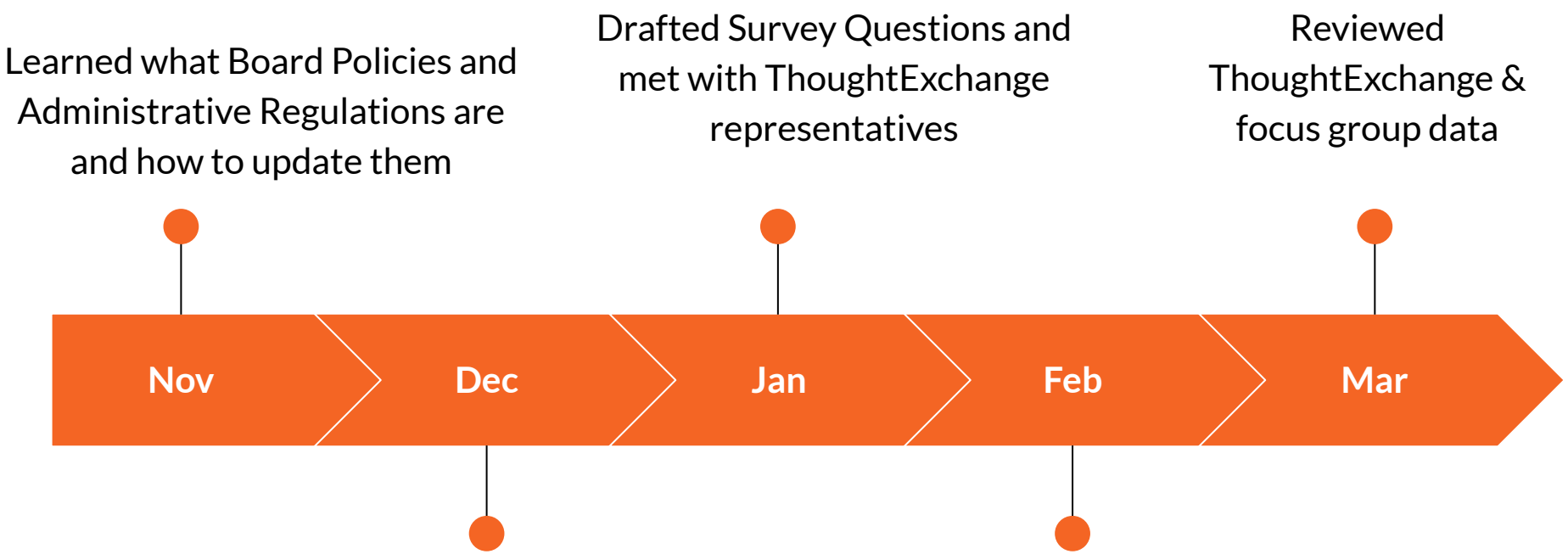
Overview

Dress Code Policy Committee

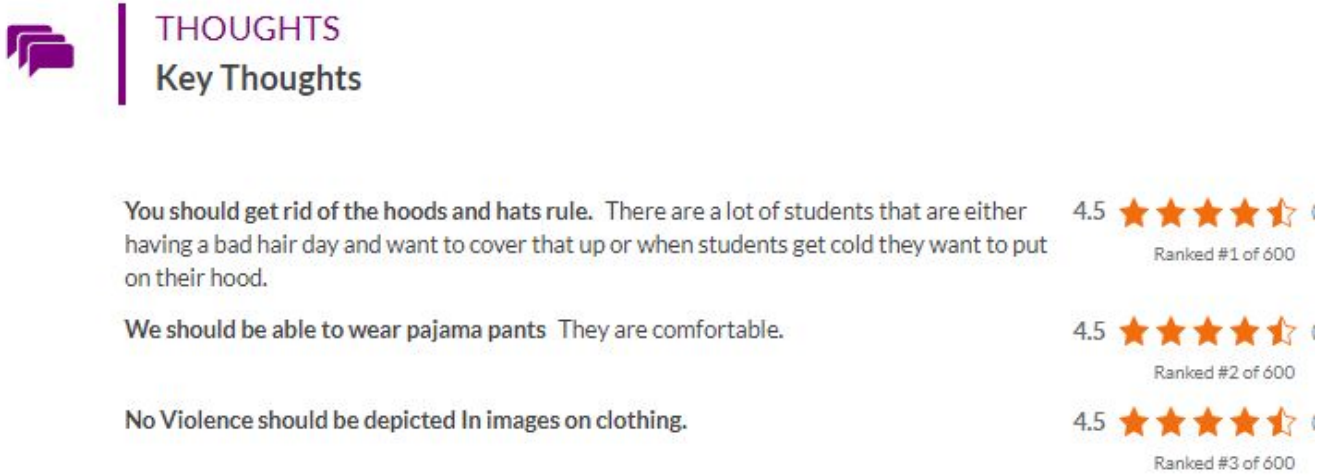
Our group is comprised of students from schools across the district who are passionate about updating the dress code.

Team's Process

- We have met weekly from November until May
- Reviewed the old dress code
- Collected feedback from students, staff, and parents
- Created recommendations for a new dress code policy


Learned what Board Policies and Administrative Regulations are and how to update them
Drafted Survey Questions and met with ThoughtExchange representatives
Reviewed ThoughtExchange & focus group data
Nov
Dec
Jan
Feb
Mar
Reviewed the current dress code for NUSD and NCS
Develop recruitment language and questions for focus group; ThoughtExchange opened

ThoughtExchange Data



Student Data

"middle school is where we are expressing ourselves, the dress code makes that hard"

"I don't like that you can't wear holes in your jeans without having anything under it"

"it's very difficult to find shorts that fit those requirements"

I think boys & girls should be able to wear whatever they want. (as long as it is not inappropriate.) Somtimes peeps call things "boy things" and "girl things" but it anybody can wear anything.

4.4 ★★★★½
Ranked #3 of 347

Dress code is a topic that I understand is important but it should be equal to boys as it is girls

4.4 ★★★★½
Ranked #4 of 347

I think the dress code is important to share your social identity, what you love, and who you are. The dress code restricts inappropriate materials, which I agree with, however I believe that one should express themselves their own way.

4.4 ★★★★½
Ranked #5 of 347

I think It needs some work. People should wear what makes them happy and comfortable.

4.4 ★★★★½
Ranked #6 of 347

Staff Data

THOUGHTS
Key Thoughts

We are spending a lot of time on dress code We spend a lot of time telling kids to take off hats or not wear PJs and is that really the fights we want to be having?

4.2 ★★★★☆
Ranked #1 of 24

Culture is for students to experience. Women, in particular, should not be limited by men's issues. Blaming women for men's antisocial behavior is part of the patriarchy that is not yet demolished. We must embrace the future, not seek to incriminate.

4.1 ★★★★☆
Ranked #2 of 24

Dress codes should be gender neutral and an appropriate level of causal for the setting. Dress codes should be easy to articulate and clear No one wants to take time to debate appropriateness of attire. Remaining gender neutral and developing clear language will support clarity

3.9 ★★★★☆
Ranked #3 of 24

It's racist and sexist. We spend a lot of time worrying about what kids are wearing instead of allowing them to just be in class.

3.9 ★★★★☆
Ranked #4 of 24

Parent Data

Dress code should be comfortable and non-distracting. Kids shouldn't worry about what they wear and should be comfortable to learn.

Dress code violators should be addressed privately and apply to all student groups equally. Unfairly targeting students with gender-based policies only further enforces archaic ideas of gender and sexualizes young teen girls.

I would like to see a culturally competent dress code. Our dress code should reflect the diversity of our district.

A good dress code policy should apply equally to everyone equally- no double standards. If girls can't wear tank tops, neither can boys. It's important that students learn that different attire is appropriate for different settings. The problem comes when girls are unfairly targeted.

Proposed Changes

Change language from “distracting” to “disruptive”

Add inclusive language to ensure students are not prohibited from dressing in a manner consistent with their gender identity or expression, religious observance, or culture and is not applied disproportionately to any one group of students

Add expectations that any dress code violation notification and corrective actions will be done privately

Allow hats to be worn indoors, but not the hoods of sweatshirts or jackets

Add any required updates based on Education Code

Questions?

Thank you for considering our recommendations for an updated dress code policy.

Approved by NCS Board on: March 11, 2015

NOVATO CHARTER SCHOOL
DRESS CODE POLICY

I. PURPOSE

A. To define acceptable apparel and personal grooming at Novato Charter School.

B. To define enforceable standards of apparel and personal grooming.

C. To define procedures to be followed should the enforceable standards be violated.

II. AUTHORITY

A. First Amendment and Fourteenth Amendment of the Federal Constitution; the California State Constitution

III. BACKGROUND

A. This policy has been developed after extensive comment from Faculty, Parents, Middle School Students and the Board of Trustees.

B. The Novato Charter School makes every effort to support students to develop an awareness of self, based on an inner knowing of personal beauty, and discourages the development of a false sense of self based on media, commercial, sexist or racist influences. Support and cooperation of all parents are requested to encourage moderation in clothing and personal grooming for the sake of creating an atmosphere conducive to learning. In an effort to create a healthy working and learning environment at school, students are expected to wear clothing that is clean, simple and in good repair. Clothing and shoes should be suitable for both indoor and outdoor activities. Simplicity and appropriateness should be major considerations.

C. School administrators may prohibit clearly-specified types of clothing or accessories it reasonably believes lead to disruption of the School's educational environment, to foster a safe, non-violent atmosphere (*Jeglin v. San Jacinto Unified Sch. Dist.* (C.D. Cal.1993) 827 F.Supp. 1459, 1460-1461).

D. Public school students have free speech rights under the First Amendment of the Federal Constitution and also under the California Constitution. The Fourteenth Amendment of the Federal Constitution also provides the rights to liberty. These rights do not disappear once the student enters school grounds.

IV. DEFINITIONS

A. **Media** means any of the following:

- References to television shows and characters.
- References to movie & video characters.
- References to popular consumer products.

V. POLICY

Recommended Apparel:

The Novato Charter School discourages the use of clothing with media advertisement, cartoon images or slogans, and commercial logos of any kind. The use of makeup, fingernail polish, hair dye, tattoos, and heavy jewelry is discouraged.

In an effort to create a productive working and learning environment at school, students are expected to wear clothing that is clean, simple and in good repair. Excessively loose (baggy) or tight clothing is not allowed.

Children need comfortable, practical, flat-soled shoes that are firmly attached to their feet. Shoes are to be free of lights and wheels. Toes and heels should be covered to allow the freedom to safely run, play and climb. Crocs, boots (Uggs, cowboy, etc.) and dress shoes, limit mobility and can be unsafe. 8th Graders are allowed to wear open-toed shoes, including flip-flops, provided they bring athletic footwear to school for daily movement.

Extreme hairstyles and dyed hair are strongly discouraged for all students, and are definitely inappropriate in grades K-6. Hair should not hang in the eyes: students should either tie hair back from the face or trim bangs accordingly.

The following are enforceable standards:

A. Clothing and accessories (e.g., backpacks, lunch boxes) marked with references to drugs, alcohol, racism, sexism or violence are prohibited.

B. Skirts/shorts/dresses should be a horizontal hand (student's own hand) above the knee or longer. Horizontal hand measurement applies to any outer garments worn regardless of tights or leggings underneath the skirt/shorts/dress.

B. 5th through 8th Grade Students: Leggings, Jeggings, Yoga/Athletic pant wear can be worn as an under layer for modesty or warmth. The outer layer (skirt, shorts, sweater, dress, etc.) must come down to the longest finger when arms are straight down alongside the body. Students may remove the outer layer for Movement Class. Leggings must not be see- through.

D. Strapless dresses, tube tops, low-cut tops, spaghetti straps that do or could expose cleavage, see-through tops without a modest camisole and midriff tops are considered to be improper school attire and are therefore prohibited. Undergarments should not be visible, straps included. Tank top straps shall be equal or wider in width than the combined width of the index and middle fingers of the student wearing the tank top. For the purposes of measurement, the fingers of either the right or left hand shall be placed over the tank top straps and if the two fingers fully cover any of the straps, then the tank top strap width shall be deemed too narrow. Attire that exposes undergarments, midriff and/or buttocks is prohibited.

E. Excessive or extreme jewelry or accessories, e.g., dangling chains, spiked bracelets, large earrings are prohibited.

VI. PROCEDURE/ Enforcement

A. The Director and the class teachers shall monitor the dress standards at the Novato Charter School in accordance with the Dress Code Policy. The Director and class teachers may counsel students with reference to the Dress Code Policy.

B. If a student is found to be in violation of the enforceable standards of this policy, the Director or teacher may take action in the following successive steps:

1. Speak to a student privately – suitable, alternative clothing may be provided by the school.
2. Call a student's parents to provide a change of clothing.
3. Issue a Behavior report.
4. Meet with a student and his/her parents.
5. Suspend a student.

C. Should any questions of attire and personal grooming arise that are not addressed in this Policy, determination will be made at the discretion of the Director or designee.

TO: NCS Board

FROM: Karina Haedo, Assistant Director
DATE: 5/11/22
RE: First Reading of Field Trip Policy

Board Priority/Goal:

1. Student Safety
2. Fiscal Responsibility

Objective: To identify parameters for field trips, including chaperone qualifications and reasonable maximum cost allowances.

Background: The Novato Charter School is guided by the Core Principles for Public Waldorf Education as outlined by the Alliance for Public Waldorf Education. These principles support and enrich student learning through experiential and environmental field trips.
Key elements of the field trip policy include:

- That a student would not be excluded from participation due to lack of funds.
- That the board would approve the use of NCS funds for overnight field trips.
- That there is a process for approving a staff member's request to conduct a field trip.

Funding Source Recommendations: NCS/Novato Charter School Foundation
Recommendation: To approve the first reading of the Field Trip Policy
Supporting Documents: N/A
Legal References:

California Education Code 35330

NOVATO CHARTER SCHOOL
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www.novatocharterschool.org

Field Trips & Excursions Policy

The Governing Board recognizes that field trips supplement and enrich the classroom learning experience, lead to increased student achievement, and foster student engagement. The Board encourages field trips to reinforce and increase learning opportunities and to enhance school programs.

Field trips shall be conducted in connection with the school's course of study or school-related social, educational, cultural, athletic, school band, or other extracurricular or co curricular activities. A field trip to a foreign country may be permitted to familiarize students with the language, history, geography, natural science, and other studies relative to the school's course of study. (Education Code 35330)

Requests for field trips involving out-of-state, or overnight travel shall be submitted to the director or designee. The director or designee shall review the request and make a recommendation to the Board as to whether the request should be approved by the Board. All other field trips shall be approved in advance by the director or designee.

The director or designee shall establish a process for approving a staff member's request to conduct a field trip. When planning trips, staff shall consider student safety, objectives of instruction, the most effective use of instructional time, the distance from school, and student expense, and transportation and supervision requirements. The director or designee may exclude from the trip any student whose presence on the trip would pose a safety or disciplinary risk.

No field trip shall be authorized if any student would be excluded from participation because of a lack of sufficient funds. The director or designee shall coordinate with community groups to supply funds for students in need. (Education Code 35330)

The Board may approve the use of NCS funds for student expenses for in-state, out-of-state, or field trips or excursions when permitted by law. In addition, expenses of instructors, chaperones, and other personnel participating in such trips, as well as incidental expenses for the use of district equipment during the trip, may be paid from district funds. (Education Code 35330)

Policy No._____
Effective date: October 20, 2004
Supersedes: NCS Policy approved 3/17/04

NOVATO CHARTER SCHOOL

FIELD TRIP POLICY

I. PURPOSE

Provide guidelines for planning and conducting school Excursions and Field Trips to maximize student, teacher and chaperone safety and instructional benefit.

II. AUTHORITY

A. Novato Unified School District Board Policy number 6153 – "Field Trips and Excursions",

B. California code of Regulations, Education Code Sections 35330-35332, and 32040-32044

C. All Novato Charter School policies

D. California Vehicle Code

III. BACKGROUND

Field Trips are an integral part of the Novato Charter School curriculum. The policy guidelines and procedures stated henceforth are to maximize safety and instructional benefit to NCS students.

IV. DEFINITIONS

A. Excursion

Excursion is a short walking trip that occurs during the course of a single school day.

B. Field Trip

1. Day Field Trips are longer in distance or time than an Excursion, but do not have an overnight component.

2. Over-night Field Trips are field trips that have an overnight component.

C. Chaperone

A parent, guardian, or other Director approved adult who accompanies the Excursion or Field Trip in order to provide supervisory support to the students under the direction of the class teacher.

D. Water Activities

Water activities are any activities other than swimming that involve student's interaction with or in a body of water.

E. Swimming

Swimming is the act of treading or propelling oneself along in water by natural means.

V. POLICY

A. General

1. All Field Trips must be planned considering:
   a. Instructional objectives: Appropriate instruction precedes, continues during, and follows each trip.
   b. Student safety

B. Participation

1. Siblings are not permitted on Field Trips unless they are a student in a participating class or are a director-approved chaperone.

2. No student shall be denied the opportunity to take part in an Excursion or Field Trip because of inability to pay for admission fees, meals, lodging, or any other costs.

C. Authorization

1. The Director has authority to approve or disapprove all Excursions and Field Trips, their activities, and participants. The Novato Charter Board must approve all Overnight Field Trips and all Field Trips that are 100 miles or more in distance one way from the school.

2. A teacher planning an Excursion or Field Trip shall make a request to the Director for approval by submitting a Field Trip Request Form (Attachment A).

   a. Any request for field trips that require Board approval must be submitted to the Board six (6) weeks prior to the designated departure date.

   b. Any request for field trips that require Board approval and that will be scheduled to depart within the first six (6) weeks of the commencement of a new school year must be submitted to the Board by May 1st of the previous school year.

3. If an Excursion or Field Trip is not approved, the NCS Director shall state the reasons in writing on the Field Trip Request Form.

4. Written approval of parent or guardian is required for participation of students in all Excursions and Field Trips. A general parental approval form for Excursions

may be submitted on an annual basis. (NUSD Parent Permission For Student Participation In Off-Campus School Sponsored Events Form – NUSD # 600348E(S)

D. Teachers

Teachers are accountable to the Director for ensuring that all school polices and all applicable State and local laws are adhered to and enforced on Excursions and Field Trips and that Chaperone behavior is consistent with school campus behavior. Should teachers require assistance from the Director, they shall contact the Director or a designee during the Field Trip.

E. Chaperones

1. Chaperones not a parent or guardian shall be 25 years of age or older.

2. Chaperones are accountable to the class teacher and Director for their behavior. Behavior that is acceptable on the actual school campus is what is expected of Chaperones on all Excursions and Field Trips.

3. Before all Excursions and Field Trips, teachers shall provide all Chaperones that will accompany the students with clear information regarding their responsibilities, including standard and trip specific safety precautions, how to keep groups together, and what to do if an emergency occurs.

4. The Director shall approve all Chaperones for Excursions and Field Trips and has discretion to deny participation to any person at any time.

5. Chaperones are entitled to occasional breaks from supervision at the direction of the teacher when student safety is not materially compromised.

F. Field Trip Transportation

1. In accordance with California Vehicle Code Section 545, any vehicle designed to carry more than 10 persons including the driver is defined as a school bus.

2. In accordance with California Vehicle Code Section 12517, (a) No person shall operate a school bus unless that person has in his or her immediate possession a valid driver's license for the appropriate class of vehicle to be driven endorsed for passenger transportation. When transporting one or more pupils at or below the 12th-grade level to or from a public or private school or to or from public or private school activities, the person shall also have in his or her immediate possession a certificate issued by the department to permit the operation of school buses.

3. Any out-of-State drivers used for Field Trip transportation in a state other than California shall have licensure and certification qualifying them to transport school children in a school bus, student activity bus, or certified tour bus.

4. Upon recommendation of the NHTSA (National Highway Traffic Safety Administration,):

   a. 15-passenger vans shall transport no more than 10 people including the driver.

   b. Vans designed for 10 or more occupants and Sport Utility Vehicles shall not utilize top carriers for transport of field trip luggage/equipment.

   c. No vehicle shall load to such a capacity that safety is compromised.

5. Privately owned vehicles may be used to transport students in grades K-8 on Field Trips with prior approval of the NCS Director.

   a. Vehicles must be driven by adult licensed drivers who have appropriate insurance and have completed all driver forms prior to the date of the Field Trip.

      1. Before students may be transported in any private vehicle, the driver of each vehicle must complete and sign Novato Unified School District Driver Information Employees and Volunteers Form (NUSD#600130 – Annex I) and submit all necessary documentation required by the above referenced form.

      2. The form and documentation must be submitted to the NCS office for approval.

   b. The NCS Director will evaluate and sign the vehicle forms indicating approval of all Field Trip drivers. The school Director or designee shall deny the opportunity to transport students to any person who does not meet all requirements.

   c. Driver approval expires June 30 and must be renewed each school year.

   d. The number of passengers, including the driver, shall not exceed the capacity for which the vehicle was designed.

   e. All drivers and passengers shall secure themselves in the vehicle in accordance with the law.

f. Prior to departure on all Field Trips, specific written permission of the student's parent or guardian must be provided in order for a student to ride in an owner-driven vehicle, a school bus, or a SPAB (School Pupil Activity Bus) certified tour bus.

g. Prior to departure, drivers will be instructed as follows:

1. The teacher will provide a detailed map with the route and planned stops to all drivers. The driver will follow these directions except for emergencies or unplanned teacher approved stops (e.g., to purchase gas or allow participants to use the restroom).

2. To caravan with the other drivers during the entire trip and, in accordance with California State Vehicle Code, all vehicles in caravans must proceed with headlights turned on.

3. To designate the form of communication between cars to use in route.

4. Only participating students, teachers, and other Director-approved Field Trip participants may ride in private Field Trip vehicles.

5. The driver of the student must carry copies of each student's emergency card and permission slip.

G. **Safety**

1. Supervision

a. Teachers or other designated personnel shall accompany students on all Excursions and Field Trips and shall assume responsibility for their proper conduct. Students and adults on approved Field Trips are subject to school rules, regulations and policies.

b. Before Overnight Field Trips, the class teacher, director or designee must hold a mandatory attendance meeting for staff, parents/guardians and students to discuss safety and the importance of safety-related rules and issues for the trip including local wilderness hazards pertinent to the destination.

c. All Excursions and Field Trips will have provisions made for proper supervision. (See Attachment B – Student/Chaperone Ratio Summary.) The Director and class teacher will ensure that there is adequate adult-to-student ratio to maximize student safety. Standard minimum ratios are as follows:

1. Supervision for an Excursion with a Kindergarten through 2nd grade class must include at least two (2) Chaperones in addition to a teacher, for a total of three (3) supervising adults.

2. Supervision for an Excursion with a 3rd, 4th, or 5th grade class must include at least one (1) Chaperone in addition to a teacher, for a total of two (2) supervising adults.

3. Excursions with 6th, 7th, and 8th grade do not require a chaperone provided the teacher carries a cell phone.

4. Supervision for Day Field Trips in grades K-5 must include one (1) Chaperone for every eight (8) students including the class teacher.

5. Supervision for Day Field Trips in grades 6-8th must include one (1) Chaperone for every ten (10) students including the class teacher.

6. Supervision ratio for Overnight Field Trips is one (1) adult per five (5) students including the class teacher.

7. The Director has the discretion to change minimum ratios depending on class makeup and the demands of the trip.

d. Each student shall be assigned to a teacher or Chaperone at all times. The Chaperone shall be responsible for the continuous supervision of these students' activities and at all hours for the duration of the assignment. Students shall not be left unsupervised for any reason.

e. The teacher is in charge of supervision assignments and changes as necessary throughout Excursions and Field Trips.

f. If a student's behavior is such that it endangers the group, the teacher can request at any time that the parent/guardian immediately take the child home.

g. The NCS Director may exclude from any Excursion or Field Trip any student whose presence would pose a safety or disciplinary risk.

h. As per California State regulation, written permission from both the parent and the prescribing physician is required to administer student medication on Field Trips. (See NUSD for #600135E/S NUSD Authorization to Administer Medication/Treatment.)

I. Appropriate educational experience and supervision shall be supplied for any student whose parent(s)/guardian(s) does/do not wish them to participate in a Field Trip (e.g. assigned independent study, or in-class assignment with another class).

j. Charter school staff and Chaperones shall not consume alcoholic beverages, use controlled substances or tobacco while accompanying or supervising students on an Excursion or Field Trip.

k. Chaperones will be asked prior to departure to inform the Director of any medication being used that could impair their ability to perform their driving or Chaperone duties in a prudent and safe manner.

l. In the case of a missing child, California Ed. Code 49370 requires that specified persons, including school teachers, school administrators, and etc. report missing children to a law enforcement agency in a timely manner, in order to provide those children a necessary level of protection when they are at serious risk.

2. First Aid Kits – reference Ed. Code 32040 &32041

   a. The Charter school shall provide a first aid kit(s) whenever students are taken on Excursions or Field Trips. (See Attachment C – First Aid Kits for contents and Kit to student ratio).

   b. The teacher, instructor agent, or employee shall have the first aid kit in his/her possession, or immediately available, while conducting an Excursion or Field Trip.

3. Poisonous Snakes – reference Ed. Code 32043 & 32044

   a. Whenever Field Trips are conducted in areas commonly known to be infested by poisonous snakes, the following requirements shall be met:

      1. The first aid kit taken on the Field Trip shall contain medically accepted first aid and remedies.

2. A teacher, employee, or agent of the school (parent Chaperone) must have completed a course in first aid, certified by the American Red Cross, which emphasizes the treatment of snakebites.

b. See Attachment D for assessment of wilderness hazards in different regions.

4. Water Activities/Swimming

a. Participation in water activities shall be allowed on trips when planned and approved in advance by the NCS Director.

b. Parents/guardians must provide written permission for their student to attend/participate in water/swimming activities. See Attachment E – Water Activity/Swimming Permission Form.

c. School sponsored swim parties at private residences are prohibited.

d. Swimming will be allowed in commercial swimming facilities with prior director approval. The swimming facilities or field trip sponsor must provide a certificate of insurance, designating the Novato Charter School as an additional insured, for not less than $1,000,000 in liability coverage.

e. Lifeguards must be designated and on active duty for all swimming activities. Lifeguards must be Red Cross certified or equivalent.

f. U.S. Coast Guard approved personal flotation devices, properly fitted and secured, must be worn at all times while participating in any boating/rafting activities

5. Bicycles

a. Students, faculty and chaperones will wear bicycle helmet at all times while riding a bicycle on an Excursion or Field Trip. Parents/guardians will be instructed via Bicycle Safety flyer to ensure proper fit of their child's helmet prior to excursion or field trip. (See Attachment F Proper Fit and Usage of Bicycle Helmets.)

6. Emergency Situations

All Medical (illness or injury) and Non-medical (vehicular breakdown, vehicular accident with no personal injury, missed flights etc.) emergency situations shall be handled using NCS Director approved procedures that Chaperones have been informed of prior to departure. (See Attachment G– Field Trip Emergency Procedures)

7. Fingerprinting

Chaperones on overnight field trips must be fingerprinted and cleared by the Novato Police Department, Sheriff's Department or other appropriate law enforcement agency. The school is not financially responsible for the cost of fingerprinting.

Field Trip Planning Process

All Forms hyperlinked or found in Google drive-NCS Staff Documents-> Field Trip folder

Teacher are responsible for the following, however, may assign tasks to Field Trip Coordinator:

1. **Field Trip Request Form: used for ALL FIELD TRIPS** and handed into Office Manager for approval. If the trip is overnight(s) then this form must be submitted to the Board **six (6) weeks** prior to departure date. If a field trip is within the first six (6) weeks of a new school year, then form must be submitted to the Board by May 1st of the prior school year.
2. **Certificate of Insurance**: (inquire if COI is needed when planning) Give the office manager the contract along with all paperwork regarding the field trip. COI's take 4 weeks to process.
3. **Fingerprints Form Information**: All parents who attend a field trip must be fingerprinted (parent only needs to do this once in their lifetime of being a parent at NUSD/NCS). This process can take up to 8 weeks. Paperwork can be found on our website. Fingerprint form will be processed by the UPS store. No parent is allowed on field trips until their name has been recorded on the fingerprinting list held by the office manager.
4. **Driver Authorization Form**: All drivers must complete the attached form. Paperwork needs to be into the office at least two weeks before the trip. Parent name must be on the approved list to drive on a field trip.
5. **Field Trip Permission form**: Send out to families. Send out field trip information to staff that it will be affected and as well as Student Support Staff. Give them dates and times their students will not be at school.
6. **Volunteer Application**: Please complete this form. Teachers will provide all chaperones with volunteer agreement form
7. **Chaperone questionnaire**: Please create or use and update this one
8. **Field Trip Backpack:** Obtain student medication from the office the day before the field trip.
9. **Plan**:Provide car groups, phone tree list, communication plan including departure/arrival time back on campus to the office manager. Arrange for the field trip coordinator to send out any last minute information including any last minute time change.
10. **Authorization for Medication Form**: all parents need to bring this medical form completed **by the doctor** (along with any type of medication) the week before the trip to the office.
11. **Authorization for Medication Form:** all parents need to bring this medical form completed **by the doctor** (along with the medication) the week before the trip to the office.
12. **Send all Covid Vaccination Cards:** to the Office Manager
13. If a child is injured or needs to leave the trip for some reason, call: the Office and the parent.
14. TB proof needed as of 8/2022 for all field trips

*The above listed "to do" items are the responsibility of the teacher. Teachers are responsible for all aspects of the trip. Teachers may task out responsibilities to parent helpers BUT teachers hold ultimate responsibility that all trip requirements are met.
Approval of the Director is required for all field trips and excursions.

Mar 1, 2022

Approval of the Board is required for all overnights or more than 100 miles.

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www.novatocharterschool.org

TO
NCS Board of Directors

FROM
Nikki Lloyd, Executive Director
Megan Bloom, Administrative Manager
DATE
4/15/2022

RE
Staff/Student Interaction Policy

Board Priority/Goal
1. Staff and Student Success

Objective
To approve Staff/Student Interaction Policy-Draft

Background
While NCS has always included this policy in our Handbook NCS feels that the best practice is to have a policy. Good leagal practice and required by Insurance.

Funding Source/Cost
N/A

Recommendation
NCS Administration Recommends Adoption

Supporting Documents
N/A

Legal References
EC 44050 requires website posting

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Staff/Student Interaction Policy

Novato Charter School recognizes its responsibility to make and enforce all rules and regulations governing student and employee behavior to bring about the safest and most learning-conducive environment possible.

Corporal Punishment

Corporal punishment shall not be used as a disciplinary measure against any student. Corporal punishment includes the willful infliction of, or willfully causing the infliction of, physical pain on a student.

For purposes of this policy, corporal punishment does not include an employee's use of force that is reasonable and necessary to protect the employee, students, staff or other persons or to prevent damage to property.

For clarification purposes, the following examples are offered for direction and guidance of School personnel:

A. Examples of PERMITTED actions (NOT corporal punishment)

1. Stopping a student from fighting with another student;
2. Preventing a pupil from committing an act of vandalism;
3. Defending yourself from physical injury or assault by a student;
4. Forcing a pupil to give up a weapon or dangerous object;
5. Requiring an athletic team to participate in strenuous physical training activities designed to strengthen or condition team members or improve their coordination, agility, or physical skills;
6. Engaging in group calisthenics, team drills, or other physical education or voluntary recreational activities.

B. Examples of PROHIBITED actions (corporal punishment)

1. Hitting, shoving, pushing, or physically restraining a student as a means of control;
2. Making unruly students do push-ups, run laps, or perform other physical acts that cause pain or discomfort as a form of punishment;
3. Paddling, swatting slapping, grabbing, pinching, kicking, or otherwise causing physical pain.

Acceptable and Unacceptable Staff/Student Behavior

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This policy is intended to guide all School faculty and staff in conducting themselves in a way that reflects the high standards of behavior and professionalism required of school employees and to specify the boundaries between students and staff.

Although this policy gives specific, clear direction, it is each staff member's obligation to avoid situations that could prompt suspicion by parents, students, colleagues, or school leaders. One viable standard that can be quickly applied, when you are unsure if certain conduct is acceptable, is to ask yourself, "Would I be engaged in this conduct if my family or colleagues were standing next to me?"

For the purposes of this policy, the term "boundaries" is defined as acceptable professional behavior by staff members while interacting with a student. Trespassing the boundaries of a student/teacher relationship is deemed an abuse of power and a betrayal of public trust.

Some activities may seem innocent from a staff member's perspective, but can be perceived as flirtation or sexual insinuation from a student or parent point of view. The objective of the following lists of acceptable and unacceptable behaviors is not to restrain innocent, positive relationships between staff and students, but to prevent relationships that could lead to, or may be perceived as, sexual misconduct.

Staff must understand their own responsibility for ensuring that they do not cross the boundaries as written in this policy. Disagreeing with the wording or intent of the established boundaries will be considered irrelevant for disciplinary purposes. Thus, it is crucial that all employees learn this policy thoroughly and apply the lists of acceptable and unacceptable behaviors to their daily activities. Although sincere, competent interaction with students certainly fosters learning, student/staff interactions must have boundaries surrounding potential activities, locations and intentions.

Duty to Report Suspected Misconduct

When any employee reasonably suspects or believes that another staff member may have crossed the boundaries specified in this policy, he or she must immediately report the matter to a school administrator. All reports shall be as confidential as possible under the circumstances. It is the duty of the administrator to investigate and thoroughly report the situation. Employees must also report to the administration any awareness or concern of student behavior that crosses boundaries or where a student appears to be at risk for sexual abuse.

Examples of Specific Behaviors

The following examples are not an exhaustive list:

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Unacceptable Staff/Student Behaviors (Violations of this Policy)

(a) Giving gifts to an individual student that are of a personal and intimate nature.
(b) Kissing of any kind.
(c) Any type of unnecessary physical contact with a student in a private situation.
(d) Intentionally being alone with a student away from the school.
(e) Making or participating in sexually inappropriate comments.
(f) Sexual jokes.
(g) Seeking emotional involvement with a student for your benefit.
(h) Listening to or telling stories that are sexually oriented.
(i) Discussing inappropriate personal troubles or intimate issues with a student in an attempt to gain their support and understanding.
(j) Becoming involved with a student so that a reasonable person may suspect inappropriate behavior.

Unacceptable Staff/Student Behaviors without Parent and Supervisor Permission

(These behaviors should only be exercised when a staff member has parent and supervisor permission.)

a) Giving students a ride to/from school or school activities.
b) Being alone in a room with a student at school with the door closed.
c) Allowing students in your home.

Cautionary Staff/Student Behaviors

(These behaviors should only be exercised when a reasonable and prudent person, acting as an educator, is prevented from using a better practice or behavior. Staff members should inform their supervisor of the circumstance and occurrence prior to or immediately after the occurrence)

a) Remarks about the physical attributes or development of anyone.
b) Excessive attention toward a particular student.
c) Sending emails, text messages or letters to students if the content is not about school activities

Acceptable and Recommended Staff/Student Behaviors

a) Getting parents' written consent for any after-school activity.
b) Obtaining formal approval to take students off school property for

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activities such as field trips or competitions.

c) Emails, text, phone and instant messages to students must be very professional and pertaining to school activities or classes (Communication should be limited to school technology).
d) Keeping the door open when alone with a student.
e) Keeping reasonable space between you and your students.
f) Stopping and correcting students if they cross your own personal boundaries.
g) Keeping parents informed when a significant issue develops about a student.
h) Keeping after-class discussions with a student professional and brief.
i) Asking for advice from fellow staff or administrators if you find yourself in a difficult situation related to boundaries.
j) Involving your supervisor if conflict arises with the student.
k) Informing your Director about situations that have the potential to become more severe.
l) Making detailed notes about an incident that could evolve into a more serious situation later.
m) Recognizing the responsibility to stop unacceptable behavior of students or coworkers.
n) Asking another staff member to be present if you will be alone with any type of special needs student. Asking another staff member to be present when you must be alone with a student after regular school hours.
o) Giving students praise and recognition without touching them.
p) Pats on the back, high fives and handshakes are acceptable.
q) Keeping your professional conduct a high priority.
r) Asking yourself if your actions are worth your job and career

NOVATO CHARTER SCHOOL

Application for NCS Board of Directors

Thank you for your interest in serving on the NCS Board of Directors. This application consists of three parts: the biographical information to be completed below and both a shorter and longer statement of your qualifications and ideas for the NCS (these statements are described in detail below). Please complete all three parts and return them to the NCS Board Clerk, Megan Bloom (mbloom@nusd.org) no later than **the last Friday in April**.

Name: Chris Shortall

Address: 25 Tree Ln, Novato, CA 94947

Telephone (Home): 415-408-3169 Telephone (Cell): 415-686-0873

Can you commit to a minimum of one evening plus an additional five to ten hours of time a month? Yes

Explanation if necessary:

Please complete and return with this application form a short, 50-word statement for publication in *The Thread* addressing your qualifications for the job and a brief description of your vision for the school. You must also complete a longer (maximum one typed page) statement specifically answering the questions listed below. This second statement will be posted on the Bulletin Board and will be available as a handout in the office.

1. What do you hope to accomplish as a member of the NCS Board of Directors?

There are two areas that I believe are critically important to our school that I would seek to focus on as a member of the Board:

- Community: I believe that building a community of families at NCS is critical to the success of this school. I want parents to view NCS not just as a place where your kids are dropped off and picked up from school each day, but as a community where people of all backgrounds and philosophies are welcomed and encouraged to participate. I believe one of the many reasons that NCS stands out among Novato public schools is the community that has been built here. But I worry that COVID-19 has put a dent in that; I want to focus on helping to rebuild that sense of community amongst the families who are so fortunate to send their children to NCS.
- Transparency: I believe it's critical that the NCS Board and overall Leadership be transparent about how the school is managed - whether financially or other. In my role as a member of the Board, I will seek to improve the transparency of how we operate, what we discuss, and how that is communicated across the NCS community.

2. Please list the qualifications you would bring to the job (such as management skills, financial skills, fundraising experience, other Board memberships, and/or relevant volunteer activities).

I currently work for a large ($25B+ annual revenues) technology company here in the Bay Area as a Planning & Operations Director for our Engineering organization. More specifically, I support the creation of an annual product development plan for an organization of 20,000+ employees, so I am well versed in planning and management. Prior to that experience, I worked for a large consulting firm helping large and small companies, including non-profit organizations, drive better financial process effectiveness. This has given me extensive experience on how to run and improve financial management. In my very limited spare time, I coach my 4 children's sports teams (baseball, soccer, lacrosse) and try to engage with volunteer activities at Novato Charter School whenever possible.

3. Please express something of your philosophy and vision regarding the NCS as a school guided by the Core Principles of Public Waldorf Education.

As a parent to 4 children at Novato Charter School, I am passionate about the success of our school not just for my kids, but for all children who attend. Prior to my children attending Novato Charter School, I was not familiar with Public Waldorf Education Principles as I attended Catholic Schools here in Marin County from Kindergarten through High School. Having become much more familiar with the Core Principles, I feel so fortunate that my children have the opportunity to learn in a Waldorf environment. What strikes me most about the Waldorf approach is what I perceive as a development in our children of a love for learning. Our kids aren't just being taught how to memorize

facts for a test; they're being taught to enjoy educating themselves, which they'll carry their entire lives. What a gift!

NOVATO CHARTER SCHOOL

Application for NCS Board of Directors

Thank you for your interest in serving on the NCS Board of Directors. This application consists of three parts: the biographical information to be completed below and both a shorter and longer statement of your qualifications and ideas for the NCS (these statements are described in detail below). Please complete all three parts and return them to the NCS Board Clerk, Megan Bloom (mbloom@nusd.org) no later than **the last Friday in April**.

Name: Robin J. Lee, PE

Address: 108 Montego Key, Novato, CA 94949

Telephone (Home): 415-271-3117 Telephone (Work): same

Can you commit to a minimum of one evening plus an additional five to ten hours of time a month? Yes X No _____

Explanation if necessary: Hours will mostly need to fall outside work hours if possible.

Please complete and return with this application form a short, 50-word statement for publication in *The Thread* addressing your qualifications for the job and a brief description of your vision for the school. You must also complete a longer (maximum one typed page) statement specifically answering the questions listed below. This second statement will be posted on the Bulletin Board and will be available as a handout in the office.

1. What do you hope to accomplish as a member of the NCS Board of Directors?

2. Please list the qualifications you would bring to the job (such as management skills, financial skills, fundraising experience, other Board memberships, and/or relevant volunteer activities).

3. Please express something of your philosophy and vision regarding the NCS as a school guided by the Core Principles of Public Waldorf Education.

STATEMENT 1 – 50-word statement for qualifications and a brief description of vision for the school

As a graduate of the Novato Public School system, I believe I have valuable experiences and opinions to share. My daughter is currently in kindergarten, which means I am invested in the success of the school for another 8 years. My experience at NCS thus far has been positive and I hope to continue to build and grow that for the future.

STATEMENT 2 – Questions

1. What do you hope to accomplish as a member of the NCS Board of Directors?

I hope to serve as a sounding board to the other members as I am quite new to the Novato Charter School. My background as an engineer makes me a natural problem solver. I am very organized and manage multiple projects as a consulting engineer. I bring energy, enthusiasm, and the glass is always half full attitude.

2. Please list the qualifications you would bring to the job (such as management skills, financial skills, fundraising experience, other Board memberships, and/or relevant volunteer activities).

I have two decades of project management as a consulting civil engineer. I manage both budgets and schedules of projects ranging from v$3k to over $500k. I serve as a leader and mentor to my junior staff. I am an avid excel user and enjoy creating pivot tables, vlookups, and visualization of large data sets.

In terms of volunteer experience, the majority of that time was spent pre-children. I spent several years on the fundraising committee for the Tour de Cure and have volunteered for numerous bike related activities.

3. Please express something of your philosophy and vision regarding the NCS as a school guided by the Core Principles of Public Waldorf Education.

When I first learned about the Waldorf Education principles I was very hesitant as education has always been a passion of mine and the delayed start was of reading, writing and math was scary to me. However, when the analogy of teaching a 9-month old to walk vs. a 13-month old child was provided to me a light bulb came on and I understand how precious the early years are for children and sitting still in a chair is not something that is a high priority at that young age. Zoey spent 2 weeks at Hamilton before getting off the waitlist for the Novato Charter School. The atmosphere at the Novato Charter School is one of serenity and calm, which I don't think is something you get at the more traditional school settings.

When I volunteered for Pie Day at the "nerd table" where kids were to measure circumference and diameters of round objects, I could not believe how interested the kids were. It also struck me as how mature the older students at the school are.

My husband and I are both committed to the Waldorf Education principles for at least the next 8 years.