

RIVER DELTA UNIFIED SCHOOL DISTRICT

Notice of a Regular Meeting of the Board of Trustees

By Order of the President of the Board of Trustees, this is a Call for the Regular Meeting of the Board of Trustees of the River Delta Unified School District to be held:

December 12, 2023 ♦ General Open Session 6:30pm
Rio Vista High School • Rio Vista, CA

A copy of the full agenda (with backup documents but without confidential closed session items) is available for public review at the District Office, 445 Montezuma St., Rio Vista, California, at least 72 hours prior to the announced meeting of the Board of Trustees or online at <http://rdusd.org> under the heading: Board of Trustees

ADDRESSING THE BOARD: Anyone may address the Board regarding any subject that is within the Board's subject-matter jurisdiction [Government Code Section 54954.3 and Education Code Sections 35145.5 and 72121.5]. The Board of Trustees welcomes public participation, consistent with the Brown Act, on items that appear on the agenda and those items that are not appearing on the agenda. **If you wish to address the Board during the Public Comment section of the meeting or during the corresponding item section, you must complete and submit an electronic Public Comment Card or submit a paper Public Comment Card to the Executive Assistant or designee prior to the General Open Session of the meeting.** Individuals are not required to sign in, or otherwise disclose their name or other information as a condition to attend a meeting or address the Board. You will be called upon to speak during the Public Comment section or the specified agenda item you have selected. If you prefer not to provide your name, you will need to provide how you wish to be identified when called upon. **However, understand the Board may not take action on any item which is not listed on this agenda** (except as authorized by Government Code Section 54954.2). (BB9323), The Board may ask clarifying questions related to the public comments made on items appearing on the agenda or the Board may refer such matter to the Superintendent or designee. (Education Code 35145.5, Government Code 54954.2). **Individual speakers shall be allowed three minutes to address the Board on any agenda item or non-agenda item. The Board shall limit the total time for public presentation and input on all items to a maximum of 20 minutes.** With Board consent, the Board President may increase or decrease the time allowed for public comment, depending on the topic and the number of persons wishing to be heard and the overall length of the agenda. The Board President may take a poll of speakers for or against a particular issue and may ask that additional persons speak only if they have something new to add. (BB 9323) Anyone may appear at the Board meeting to testify in support of, or in opposition to, any item on this agenda being presented to the Board for consideration. {If you wish to have an item placed on the agenda for discussion and/or action by the Board, you must notify the Board Secretary/Superintendent in writing no later than ten working days prior to a regularly scheduled Board meeting requesting permission. After the Superintendent's Cabinet has met, you will be notified of their decision.} **If you have a comment or complaint regarding a specific employee, please refrain from making a public comment and contact the employee's supervisor for resolution.**

Listen in English: Meeting ID: 976 7938 8878 Passcode: 625953

REGULAR MEETING AGENDA

1. Call the Open Session to Order (@ 5:30 p.m.)
2. Roll Call
3. Conduct Reorganizational Duties, Including the Election of Officers for 2024: Elect the President, Vice President and Clerk Positions as well as the SCOE Board Representative – Katherine Wright, Superintendent

President _____ Vice President _____ Clerk _____ SCOE Rep. _____

Motioned: _____ Second: _____

Roll Call Vote:

Member Mahoney __; Member Riley __; Member Casillas __; Member Lamera __; Member Apel __; Member Jelly __; Member Stone __

4. Review Closed Session Agenda (see attached agenda)
 - 4.1 Announce Closed Session Agenda
 - 4.2 Public Comment on Closed Session Agenda Items Only
 - 4.3 Approve Closed Session Agenda and Adjourn to the **Closed Session (@5:35 p.m.)**

Motioned: _____ Second: _____ Ayes: _____ Noes: _____ Absent: _____ Time: _____

5. Reconvene to Open Session (@ approx. 6:30 p.m.) Time: _____
 - 5.1 Retake Roll Call

Member Stone ___; Member Jelly ___; Member Riley ___; Member Casillas ___;
Member Apel ___; Member Mahoney ___; Member Lamera ___

5.2 Pledge of Allegiance

6 Report of Action taken, if any, during the Closed Session (Government Code Section 54957.1) –
Board President

7 Review and Approve the **Open Session** Agenda

Motioned: _____ Second: _____ Ayes: _____ Noes: _____ Absent: _____

8 **Public Comment: Individual speakers who have submitted a Comment Card shall be allowed three minutes to address the Board on any non-agendized item. The Board shall limit the total time for public presentation and input on all items to a maximum of 20 minutes.** The Board will follow the process for Public Comments listed above.

Special Presentations, Reports, Information

9.1 Special Presentations

9.1.1 Presentation Fulbright Experience in Scotland - Donnie Surla, Rio Vista High School
Teacher

9.2 Board Member(s) and Superintendent Report(s) and/or Presentation(s) –

9.2.1 Board Members' report(s)

9.2.2 Board Committee report(s)

9.2.2.1 City of Rio Vista 2 X 2 report(s)

9.2.2.2 Facilities Steering Committee report(s)

9.2.1.1 Riverview Middle School's Modernization Project Revised Budget Discussion

9.2.1.2 Rio Vista High School's Modernization Project Revised Budget Discussion

9.2.3 Superintendent Wright's report(s)

9.2.3.1 Employee J-1 Visa Opportunities

9.3 Business Services' Reports and/or Presentations on: Routine Restricted Maintenance;
Deferred Maintenance; Maintenance and Operations; Transportation Department; Food Services
Department; District Technology; and District Budget – Tammy Busch, Asst. Superintendent of
Business Services

9.3.1 Business Services' Report – Tammy Busch, Asst. Superintendent of Business
Services

9.3.1.1 ADA/Enrollment Report – Tammy Busch, Asst. Superintendent of Business Services

9.3.1.2 Transportation Update – Michael Mimiaga, Supervisor of Transportation

9.4 Education Services' Reports and/or Presentation(s) - Nancy Vielhauer, Asst. Superintendent of
Educational Services and Tracy Barbieri, Director of Special Education

9.4.1 Educational Services Update – Nancy Vielhauer, Asst. Superintendent of
Educational Services

9.4.2 Special Education Update – Tracy Barbieri, Director of Special Education

9.5 River Delta Unified Teacher's Association (RDUTA) Update – Chris Smith, RDUTA President

9.6 California State Employees Association (CSEA) Chapter 319 Update – Patty DuBois, CSEA
President

10. **Consent Calendar**

10.1 Approve Board Minutes

Regular Meeting of the Board, November 14, 2023

10.2 Receive and Approve Monthly Personnel Reports

As of December 12, 2023

10.3 District's Monthly Expenditure Report

November 2023

10.4 Request to Approve the Isleton Elementary School 6th Grade Students to Attend the Sly Park
Science Camp, January 22-26, 2024 – Stacy Wallace, Principal

10.5 Request to Approve the Overnight Field Trip for Rio Vista High School's Model UN Club to Attend
the Berkeley Model United Nations Conference on March 8-10, 2024 – Clarence Isadore, Principal

10.6 Request to Approve the Revised Dates and Location for Delta High School's Future Farmers of
America (FFA) Students to Attend the Made for Excellence/Advanced Leadership Academy
Conference – Craig Cornelson, Principal

- 10.7 Request to Approve an Overnight Field Trip for the Delta High School (DHS) Wrestling Team to Attend the 2023 Clear Lake HS Michael Kroppmann Memorial Wrestling Tournament in Lakeport, CA from December 15-16, 2023 – Craig Cornelson, Principal
- 10.8 Request to Approve the America Field Service (AFS) Overnight and Out-of-State Field Trip for Rio Vista High School AFS Students to Travel on April 26-29, 2024 Roosevelt High School- Wyandotte, Michigan – Clarence Isadore, Principal
- 10.9 Donations or Receive and Acknowledge

Isleton Elementary School – 6th Grade Sly Park Science Camp

- Bob’s Bait Shop - \$255
- McDonald’s (My Edeavors Inc.) - \$510
- Moreno Trenching - \$1530
- Isleton Coffee Company - \$510
- McBoodery - \$510
- Dolk Tractor - \$225
- Alma Raygoza - \$700
- Steve Wright - \$255

Bates Elementary School – Associated Student Body Account

- Bates Elementary Parent Teacher Association - \$5,865

Motioned: _____ Second: _____ Ayes: _____ Noes: _____ Absent: _____

Action Items -- Individual speakers who have submitted a Comment Card shall be allowed three minutes to address the Board on any agenda item. The Board shall limit the *total time* for public presentation and input on *all items* to a maximum of 20 minutes including the Public Comments made previously in this meeting. The Board will follow the process for Public Comments listed above.

- 11. Complete The Reorganizational Duties (under the provisions of Ed Code 35143 and 50171) by Setting and Approving a Schedule of Regular Board Meetings for Calendar Year 2024 – Board President

Motioned: _____ Second: _____ Ayes: _____ Noes: _____ Absent: _____

- 12. Request to Approve the Second and Final Reading of the Updated or New Board Policies, Administrative Regulation and or Exhibits Due to New Legislation or Mandated Language and Citation Revisions as of September 2023 and Special Revisions as of October 2023 – Katherine Wright, Superintendent

Motioned: _____ Second: _____ Ayes: _____ Noes: _____ Absent: _____

- 13. Request to Approve the 2024-25; 2025-2026 and 2026-2027 District School Calendars – Katherine Wright, Superintendent

Motioned: _____ Second: _____ Ayes: _____ Noes: _____ Absent: _____

- 14. Request the Approval of the First Interim Financial Report for FY 2023-2024 – Tammy Busch, Asst. Superintendent of Business Services

Motioned: _____ Second: _____ Ayes: _____ Noes: _____ Absent: _____

- 15. Request to Approve the Administrative Job Descriptions for Secondary Principal, Elementary Principal, Vice Principal, Director of Personnel, Executive Assistant to the Superintendent and Board of Trustees – Katherine Wright, Superintendent

Motioned: _____ Second: _____ Ayes: _____ Noes: _____ Absent: _____

- 16. Request to Approve Resolution #857 to Pay Absent Board Member Jennifer Stone Due to Illness, Family Illness Or Injury from the November 14, 2023, Regular Meeting of the Board of Trustees – Board President Lamera

Motioned: _____ Second: _____

Roll Call Vote:

Member Stone ___; Member Jelly ___; Member Riley ___; Member Casillas ___; Member Apel ___; Member Mahoney ___; Member Lamera ___; Vote: _____

- 17. Request the Board’s Direction on the Proposal from Syserco Energy Solutions – Tammy Busch, Asst. Superintendent of Business Services

Motioned: _____ Second: _____ Ayes: _____ Noes: _____ Absent: _____

- 18. Request to Approve the Fee Proposal from RGM Kramer to Provide Construction Management Services for Measure J and K Facilities Bond Projects, not to exceed \$155,692 – Measure J and \$49,166 – Measure K Bond Funds- Tammy Busch, Asst. Superintendent of Business Services

Motioned: _____ Second: _____ Ayes: _____ Noes: _____ Absent: _____

- 19. Request to Approve the Fee Proposal from RGM Kramer to Provide Construction Management Services for the District Office Repair Project, not to exceed - \$25,240 Deferred Maintenance Funds – Tammy Busch, Asst. Superintendent of Business Services

Motioned: _____ Second: _____ Ayes: _____ Noes: _____ Absent: _____

20. Request to Award the Contract to Hometown Construction for the HVAC Projects at Clarksburg Middle School, Isleton Elementary School, Rio Vista High School; and to Authorize the Superintendent or Designee to Award the Contract for D.H. White Elementary School I- All Projects not to exceed \$884,252 – ESSER Funds – Tammy Busch, Asst. Superintendent of Business Services
 Motioned: _____ Second: _____ Ayes: _____ Noes: _____ Absent: _____
21. Request to Approve the Proposal from Capital Engineering to Provide Design Services for the Rio Vista High School Woodshop Dust Collection System, not to exceed \$17,650 – Measure J Bond Funds – Tammy Busch, Asst. Superintendent of Business Services
 Motioned: _____ Second: _____ Ayes: _____ Noes: _____ Absent: _____
22. Request to Approve the Contract for the Rio Vista High School Low Voltage Systems Assessments for Telecom, Fire Alarms, Clock/Bell and PA Related Systems with O’Mahony & Myer, not to exceed \$3,000 – Measure J Bond Funds - Tammy Busch, Asst. Superintendent of Business Services
 Motioned: _____ Second: _____ Ayes: _____ Noes: _____ Absent: _____
23. Request to Approve Change Order #1 for the Delta High School / Clarksburg Middle School Cafeteria Modernization to Bobo Construction – Tammy Busch, Asst. Superintendent of Business Services
 Motioned: _____ Second: _____ Ayes: _____ Noes: _____ Absent: _____
24. Request to Approve the Agreement with Ubeo Business Services for File Conversion Services in the amount of \$285,685, Unrestricted General Funds – Tammy Busch, Asst. Superintendent of Business Services
 Motioned: _____ Second: _____ Ayes: _____ Noes: _____ Absent: _____
25. Request to Approve the Contract with Universal for Giotech Services for Delta High School’s Septic Project – not to exceed \$5,000, Measure K Bond Funds – Tammy Busch, Asst. Superintendent of Business Services
 Motioned: _____ Second: _____ Ayes: _____ Noes: _____ Absent: _____
26. Request for Future Board Agenda Items from Board Members – Board President
 Motioned: _____ Second: _____ Ayes: _____ Noes: _____ Absent: _____
27. Re-Adjourn to continue Closed Session, if needed
28. Report of Action taken, if any, during continued Closed Session (Government Code Section 54957.1) - Board President
29. Adjournment
 Motioned: _____ Second: _____ Ayes: _____ Noes: _____ Absent: _____ Abstentions: _____ Time: _____

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Americans with Disabilities Act Compliance: Any and all requests for “...any disability-related modification or accommodation, including auxiliary aids or services...” needed to access our agendas or to participate in the public meetings, must be received in writing by the Superintendent’s Office at 445 Montezuma Street, Rio Vista, CA 94571 at least annually before July 1 of each year -- or at least 5 calendar days prior to the individual meeting in question. All inquiries may be directed to the Superintendent’s Office c/o Jennifer Gaston at (707) 374-1711.

AFFIDAVIT OF NOTICING AND POSTING:

I, Jennifer Gaston, Executive Assistant to the Board of Trustees, declare that a copy of this Regular Meeting Agenda/Notice was posted in the bulletin board in front of the District Office and that the Board of Trustees Members, District administrative offices and schools, the community libraries were provided notice or caused to be provided notice via fax, e-mail and/or hand delivery on Friday, December 8, 2023, by or before 5:30 p.m.

By: Jennifer Gaston, Executive Assistant, to the Superintendent.

ATTACHMENT
RIVER DELTA UNIFIED SCHOOL DISTRICT

Notice of a Regular Meeting of the Board of Trustees

By Order of the President of the Board of Trustees, this is a Call for the Regular Meeting of the Board of Trustees of the River Delta Unified School District to be held:

December 12, 2023 ♦ Closed Session 5:35pm
Rio Vista High School • Rio Vista, CA

As provided by Government Code Section 54957, the Board is requested to meet in closed session for consideration of **personnel appointment, employment, discipline, complaint, evaluation or dismissal** [Government Code Section 54957], **possible or pending litigation** [Government Code 54956.9(a)(b)(c)], **student discipline** [Education Code Sections 49070 (c) and 76232 (c)], **employee/employer negotiations** [Government Code Section 3549.1 and 54957.6], or **real property transactions** [Government Code Section 54956.8].

A Closed Session will be held beginning at 5:35 p.m. on December 12, 2023, at Rio Vista High School, Rio Vista, California (which is prior to the full Open Session). Any formal action taken by the Board will be reported in the Open Session of this regular meeting of the Board of Trustees [Government Code Section 54957.1]. As needed, this Closed Session may be reconvened following the full Open Session. Any formal action taken by the Board will be reported in Open Session prior to adjournment.

4. CLOSED SESSION

4.1 **Student Discipline** [Education Code Sections 49070 (c) and 76232 (c)].

4.1.1 Student Case #2223-222-002

4.1.2 Student Case #2223-321-006

4.2 **Possible or Pending Litigation** [Government Code 54956.9(a)(b)(c)]

Following Conference with Legal Counsel (Parker & Covert, LLC; Edwards, Stevens & Tucker LLP; Burke, Williams & Sorensen, LLP) – Pending or Anticipated Litigation/Potential Case(s) Update(s)

4.2.1 Name(s) unspecified as disclosure would jeopardize the service of process and/or existing/possible settlement negotiations

4.2.1.1 Development Discussion with Counsel (Parker & Covert, LLC) and SCI Consulting Group, the River Delta Unified School District’s Lead Negotiator

4.3 **Personnel Evaluation, Searches, Appointment, Employment, Complaint, Discipline, Dismissal, Non-reelects and Releases** [Government Code Section 54957]

Following Conference with Legal Counsel (Edwards, Stevens & Tucker LLP)

Public Employee(s) Evaluation:

4.3.1 Certificated

4.3.2 Classified

4.3.3 Public Employee(s) Searches, Appointment, Employment conditions

4.3.4 Complaint, Discipline, Dismissal, Non-reelects, & Releases

4.3.5 Employee/Employer Negotiations [Government Code Section 3549.1 and 54957.6] Following negotiation meetings any/all units.

4.3.5.1 RDUTA

4.3.5.2 CSEA

5. Adjourn to Open Session (@6:30 p.m.) Any formal action taken by the Board in the above items will be reported in Open Session of this regular meeting of the Board of Trustees [Government Code Section 54957.1]. The meeting may be reconvened as needed (i.e. following the end of Open Session).

Motioned: _____ Second: _____ Ayes: _____ Noes: _____ Absent: _____ Time: _____

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**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: X_____

From: Katherine Wright, Superintendent

Item Number: 3_____

Type of item: (Action, Consent Action or Information Only): Action_____

SUBJECT:

The Board is to Conduct Reorganizational Duties Including the Election of Officers for 2024

BACKGROUND:

Under the provisions of Ed Code 35143 and 50171, the Board must conduct reorganizational duties including the Election of Officers for 2024.

The Board must elect the President, Vice President and Clerk positions as well as the SCOE Board representative. Immediately following the Election of the Officers, the new/returning officers will be seated to conduct their duties for the balance of the meeting.

STATUS:

2023 Board of Trustee Officers:

President: Marcial Lamera

Vice President: Jennifer Stone

Clerk: Randall Jelly

SCOE Representative: Wanda Apel

PRESENTER:

Katherine Wright, Superintendent

OTHER PEOPLE WHO MIGHT BE PRESENT:

Staff

COST AND FUNDING SOURCES:

None

RECOMMENDATION:

That the Board selects a slate of officers and approve their election service through the 2024 calendar year.

Time allocated: 3 minutes

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: X

From: Clarence Isadore, Principal

Item Number: 9.1.1

Type of item: Information Only

SUBJECT:

Presentation Fulbright Experience in Scotland - Donnie Surla, Rio Vista High School Teacher

BACKGROUND:

Mrs. Surla was granted time off last semester to attend Fullbright to Scotland as she studied mental health during the spring of 2023 school year. The Fullbright Foundation sponsored her trip and she would like to make a 5 min presentation on

- 1) Her Prologue
- 2) Getting it Right as a teacher
- 3) Getting it Right in California
- 4) Closing remarks/next steps

STATUS:

Following the leave of absence during the spring semester of 2023. Ms. Surla would like to provide the Board of Trustees with the knowledge she obtained during her Fullbright Foundation sponsored trip to Scotland.

PRESENTER:

Donnie Surla, Rio Vista High School Teacher

OTHER PEOPLE WHO MIGHT BE PRESENT:

Clarence Isadore, Principal

COST AND FUNDING SOURCES:

Not applicable

RECOMMENDATION:

That the Board receives the information.

Time allocated: 5 minutes

Getting *Getting It Right* Right:

An American Teacher's Discoveries On Scotland's Approach to
Student Wellness



FULBRIGHT
FOUNDATION

EDUCATE ★ EXCHANGE ★ ENGAGE ★ LEAD



FULBRIGHT
Teacher Exchanges

Fulbright Distinguished Awards in Teaching
Program for International Teachers

-Donalda Surla, 2022-2023 UK Fulbright Distinguished Awards in Teaching Grantee

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Getting It Right as a Teacher: My Prologue

When I became a teacher in 2003, I had the simple belief that there were two main qualities needed to be a good teacher. The first was knowing your “stuff” [my “stuff” was English and Drama], and the second was liking kids. Believing I was set in those two categories, I entered my profession with the sort of breezy confidence only a 23 year old college graduate could manage. The learning curve was steep.

Quickly, I realized that my teaching tool kit needed to be a lot bigger, and a lot more sophisticated. The “stuff” I needed to know extended well past my curriculum, as my students were lacking in so many other areas besides Shakespearean analysis and grammar usage. “Liking kids” was easy enough; but it didn’t necessarily help them. Beyond merely having affection for them, I needed to advocate for them.

At the start of my career, the most common cause for additional educational support among my students was Attention Deficit Hyperactivity Disorder. The protocols for addressing these concerns were generally clear and easy to navigate. If parents were unaware of their students’ focusing issues [or befuddled by them], alerting them to such predicaments was fairly straightforward. Teachers such as myself felt comfortable sitting in a parent meeting and approaching topics like ADHD.

As the years pass, these types of challenges are being addressed sooner in a child’s life, and becoming less of a concern by high school. Replacing and exceeding them are struggles with anxiety, depression, and personality disorders—issues that lack clear protocols. In the last decade in particular, I have seen these problems increase heavily amongst my students, and I have witnessed one after the other grapple with panic attacks, disordered eating, self-harm, addiction, and the psychological trauma

resulting from bullying, bigotry, and racism. The fallout has often included poor school performance and absenteeism, with lasting negative effects in students' lives. Sadly, the repercussions could be even more dire, as I have attended more than one funeral as a result of suicide or addiction.

As I found very little structured guidance to address the growing crisis with juvenile mental and emotional health in my home state of California, I began researching how it was being addressed elsewhere. The goal was to discover central practices that could be applied in common settings such as school sites and districts. This is how I first learned about Scotland's initiative, "Getting It Right For Every Child."

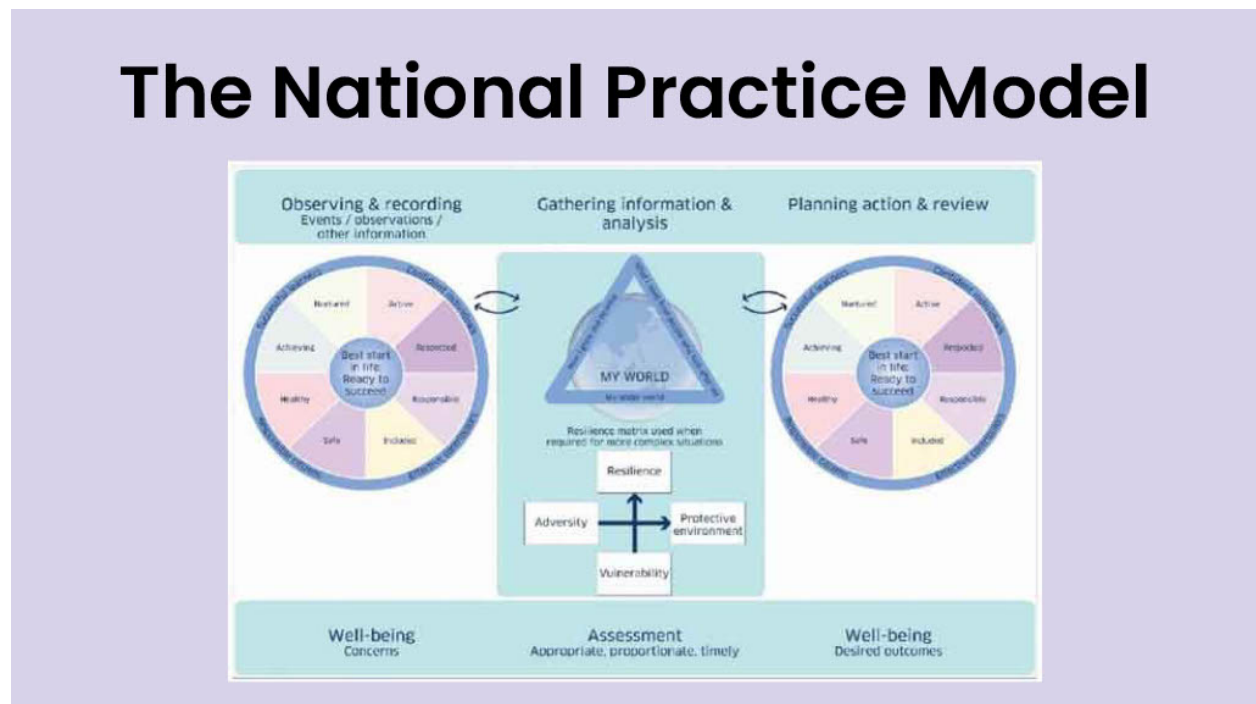
The "Rights" in Getting It Right: Background

For many decades, Scotland has aligned its childrens' policies on The United Nations Convention on the Rights of the Child [CRC]. This treatise, first written in 1989 and periodically revised, has been ratified by 194 countries (Davies). Notably, the United States is the only industrialized country to abstain, with American oppositionists consistently citing state and federal sovereignty as an obstacle to ratification (Congressional Research Service). The CRC shapes Scottish policy that prioritizes a child's wellbeing to this day.

Prior to GIRFEC, Scotland's educational schemes were guided by a program known as the "5-14/Curriculum for Excellence," dating back to the late 1980's. "5-14" referenced the targeted ages of the children being served (Malcom). As the efficacy of this curriculum was being assessed in the late 90's, it was determined that, while the program introduced the concepts of whole-child advocacy, it didn't go far enough. In

2004, a review of the Children’s Hearing system [the entity that deals with juvenile criminal matters] found that in order to decrease the number of children in the system, the country’s at-risk children needed a more proactive approach to safeguard their wellness. Consequently, in 2006 the Scotch government published the proposed implementation of a sweeping set of reforms for all children’s services. A whole system overhaul would tie in all the ways that the government planned to ensure the rights of Scottish children: health care, education, juvenile justice, and the social care sector. Two years after the initial publication of its framework, Getting It Right For Every Child was implemented across Scotland (“Policy–Getting It Right for Every Child”).

Hitting the Runway: The Framework of GIRFEC



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¹ All GIRFEC graphics are published from the Scottish Government, as cited in the Works Cited page

The template for implementing this system was laid out with the National Practice Model. It was designed with the intention of being a strong framework with ample flexibility of application to serve the unique needs of the children in various areas.

Crucial to GIRFEC was the precept that the child must be central in all decisions made in their interest. The aim was a more direct, effective line of communication between care providers, schools, community resources, and families. Empowering parents and guardians to better care for their children was a primary goal in order to reduce the number of children in the courts and in the care systems. Expected results included more consistent practices nationwide, streamlined services and shorter lag times to access resources, earlier educational and social care interventions, a reduction in the attainment gap, and higher rates of positive destinations after schooling (“Policy–Getting It Right For Every Child”). Ultimately, Getting It Right for Every Child aspired to eliminate barriers to wellness before they became problems, and to address problems earlier and more effectively.

With this came the principle that a child’s overall wellness should be regularly monitored through standardized measures and values. Parents would be primarily responsible for protecting their children’s rights, joined as a team by health care professionals, educators, and social workers, as the child’s age and circumstances determine (“Policy–Getting It Right For Every Child”). The National Practice Model, a primer on how to apply GIRFEC, established a sequence of procedures to assess and address wellness concerns in a child’s life.

8 “Wellness Indicators” were identified for this purpose, stating that all children should be: Safe, Healthy, Active, Nurtured, Achieving, Respected, Responsible, and

Included [SHANARRI]. Children’s wellness would be monitored on the basis of the



indicators, and concerns would trigger information gathering based on further criteria from the My World Triangle, and the Resiliency Matrix.

When it was suspected that extra help was needed, the My World Triangle precepts were intended to identify where support could be applied in a child’s life. Stressing the importance of positivity, this approach would highlight and utilize strengths in a

child’s world, while also measuring and exploring the risks and needs uncovered.

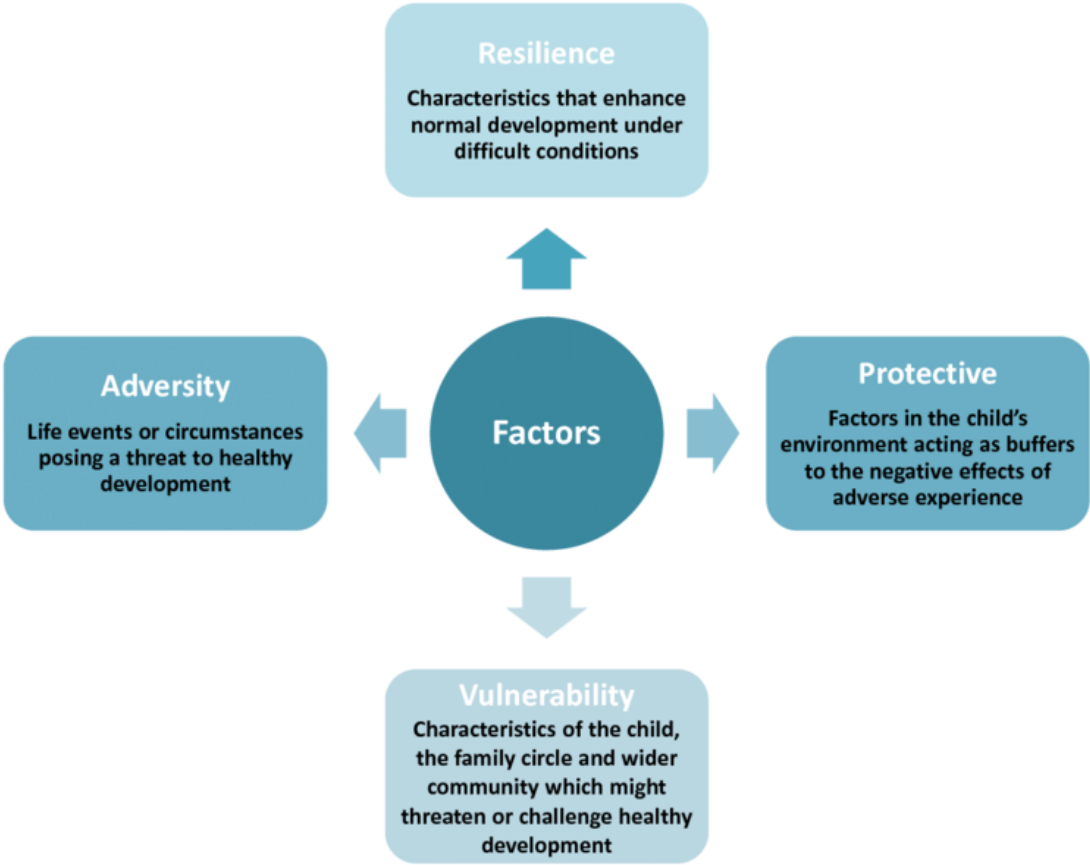
Reinforcing the idea that the child herself must be at the center of all decisions made about her, the My World Triangle represents the connections made between different parts of the child’s world (“Policy–Getting Right For Every Child”). Factors that would be considered include aspects of homelife, educational circumstances, medical/physical health challenges, and social hazards such as poverty, discrimination, and other Adverse Childhood Experiences.

This interconnected, multifaceted look at the child’s world was meant to provide more precision as to where and how support might be beneficial. It would also underscore the importance of how various elements of a child’s wellbeing are often deeply intertwined.

Once a concern was voiced, and needs were identified, the Resilience Matrix would then explore the present ability of the child to negotiate the challenges in their life. The risks and threats to the child’s wellness would be weighed against the positive

buffers (“Publication–Advice and Guidance”). For instance, a child who rarely saw their working single parent may be better positioned to handle social problems such as bullying if they have close, involved extended family nearby or a teacher they trusted. The purpose of the Matrix was to determine the urgency of the intervention needed, and the magnitude of the intervention.

Wellness plans could then be created that would be assessed for effectiveness using the aforementioned SHANARRI Indicators. This cyclical process could then be repeated as needed.



Getting It Right for Parents' Rights: The Named Person Controversy

The GIRFEC rollout was not without its controversies. A prominent feature of the plan was The Named Person. The Named Person was someone assigned to observe and support the child as an objective advocate. From birth to school age, the Named Person was usually a General Practitioner or other medical personnel. A school aged child's Named Person was typically a teacher or school official. Social workers could also be assigned to this role ("Practice Guidance: The Role of the Named Person").

Implementation of this feature was intended to begin in 2014, but was met with significant opposition from parent rights' groups who worried that The Named Person would be a major overstep of the government. They saw the assignment of an outside figure who had access to a child's records as an infringement on their privacy as well as treading on the sovereign rights of parents. There was confusion about whether or not the Named Person program was compulsory, with conflicting information being supplied by different government officials. The policy was placed on hold while it traveled through the courts, first being upheld in the Scottish courts, but later being deemed unlawful by the UK Supreme Court. Ultimately, in 2019 the Named Person program became a voluntary offering to the council areas and parents who wished to use it. All legislation intended to enshrine it as mandatory was rescinded ("Named Person Scheme Scrapped By Scottish Government").

Ceud Mile Fàilte²: A Practical Introduction

I arrived in Scotland at the end of March 2023, knowing as much about GIRFEC as I could glean from government websites and a few academic journals I had been

² Scottish Gaelic: "One hundred thousand welcomes"

steered towards. Within 48 hours, I was sitting in the Education Department at the University of Strathclyde, across from my faculty advisor, Monica Porciani. Her warm welcome included a primer on what I would find to be true in my school visits and interviews with experts: GIRFEC is strong in theory, but has yet to achieve true consistency in application. Porciani's background is in public health, and among her areas of expertise are pupil wellbeing and teacher training as it pertains to wellness ("Ms. Monica Porciani").

The Bigger Picture: Legislator Interviews

Kaukab Stewart—Scottish National Party MSP for Glasgow Kelvin

Stewart was the first MSP to respond to me. She agreed to an interview about GIRFEC before I even arrived in Scotland. I was eager to hear her perspectives on the policies for many reasons. She was a teacher in Glasgow for over 30 years, bringing an intimate understanding of education in Scotland that few other politicians can match. She was also the first woman of color elected to Scottish Parliament, and that, combined with the pockets of diverse and deprived populations in her constituency, made her an authentic representative of marginalized groups (Kaukab Stewart | Scottish Parliament).

Our discussion gave me valuable insight on how legislation can be formed from data and how it moves through the system. The conversation was focused on how GIRFEC was being used to help Scottish schools succeed. A former Deputy Convener of the Education Children & Young People Committee, and the current Convener of the Equality, Human Rights & Civil Justice Committee, Kaukab was keenly situated to

educate me on the ways GIRFEC can, is, and could be providing equity of services and opportunities to Scottish children (Kaukab Stewart | Scottish Parliament).

She encouraged me to investigate the Scottish Attainment Challenge. It was created in 2015 with the goal of “achieving equity in educational outcomes, with a particular focus on closing the poverty-related attainment gap” (“Scottish Attainment Challenge”). The rate of students who matriculate into successful and positive post-education destinations is historically far lower among deprived children. Stewart accentuated GIRFEC principles as a key part of the design process for government initiatives like the SAC, and the development of Pupil Equity Funding to achieve these goals. PEF allocates government funds directly to schools with high poverty rates to be spent however the school determines will help close the gap and foster wellness among all students (“Pupil Attainment: Closing the Gap”).

When I asked Ms. Stewart what the greatest barriers to Scottish children’s wellness were, she thought carefully before citing post-pandemic issues and the cost of living crisis. Anyone working in schools or caring for children can understand her concerns. Parent surveys conducted by the Scotch government reveal that up to 50% of the country’s children have experienced a decline in mental wellbeing. Loneliness, anxiety, depression, and isolation rates all spiked since 2020. Stewarts’ citation of economic distress also rings true, as the same data reported the wellbeing of children in deprived populations suffered worse than their more affluent peers (“Scotland’s Wellbeing”).

A lack of resources is the practical problem that GIRFEC designers have yet to solve. Parents and educators alike were mostly enthusiastic at the introduction of the



National Practice Model. In the years that followed, however, the disparities between well-funded schools and those in deprived areas became apparent. Affluent schools can appropriately staff counseling and nursing positions. Affluent schools can offer smaller class sizes and more support staff for the classroom. Affluent schools generally work from a more manageable baseline

of student wellness than their lower class counterparts. While the principles are the same everywhere, in practice, students have not experienced an equitable execution of the policies. And it has not gone unnoticed.

“There is a weariness.. a cynicism.. that has developed for some of our communities,” said Stewart of the uneven application of GIRFEC (Kaukab Stewart). Stewart represents the Glasgow Kelvin constituency, an area with both incredibly prosperous and deeply deprived neighborhoods. She went on to acknowledge that communities with high rates of poverty experienced a more profound lack of confidence in school systems. But, she continued, “we need to resist the urge to get rid of it [GIRFEC], because the theory is sound.” She emphasized that the upcoming 2023 review of the policies should identify places where practical disparities can be mended.

Ross Greer—Scottish Greens MSP for West Scotland

I knew that I would learn volumes about student wellness from Kaukab Stewart, who had decades of classroom experience, and a history of activism. I was surprised, however, by my next legislator interviewee, and how much he knew about education and children. Ross Greer, Scotland’s youngest ever elected Member of Parliament, was a rapid-fire cannon of knowledge. I requested an interview with him because his name kept popping up in my research of Parliament and GIRFEC. In hearings and committees, it seemed that Ross Greer was a near constant fixture, asking thoughtful questions, and engaging in meaningful discourse.

Greer, not yet 30, has demonstrated clearly that “young” does not always mean “inexperienced.” In his 7 years tenure as a Member of Scottish Parliament, he has



served on 9 committees. Not only has he served as his Scottish Greens party spokesperson on Education since his first election in 2016, he has also served on the Education and Skills committee [not to be confused with the Education, Children & Young People Committee... on which he serves currently] (“Ross Greer | Scottish Parliament”).

It was a busy day for Greer when he sat down at Holyrood to talk GIRFEC with me. Echoing Stewart’s sentiment that the principles and theory of GIRFEC was strong, he too cited funding as the missing key that would unlock the “every child” aspect of the

policies. But because GIRFEC was envisioned as such a sweeping reform, its scope, and therefore price tag, is immense. “It’s ambitious,” admitted Greer, noting that the designers of the initiative did not include a way to pay for all the support necessary to execute it properly, and that appropriate funding should be secured (Ross Greer).

Allowing that, he believed that the next step for GIRFEC was expansion, citing the needs of trans and queer children, whose wellness data reflects a shameful disparity with their heteronormative peers. Greer also spoke of a greater emphasis on government protections for the environment, as one of the sources of anxiety in young people is climate change. We finished our brisk but information packed discussion as he spoke excitedly on the positive effect a planned overhaul of the Scottish testing system could have on overall wellness, and on student achievement, one of the main GIRFEC principles (Ross Greer).

Fulton MacGregor–Scottish National Party MSP for Coatbridge & Chryston

Funding was again the main topic of discussion when I met with Fulton MacGregor, a Scottish National Party MSP representing Coatbridge & Chryston (“Fulton MacGregor | Scottish Parliament”). MacGregor, whose legislative record shows a history of Social Justice and Human Rights activism, lamented the reality of what Scots call “The Postcode Lottery,” a term used to describe the disparity of services from neighborhood to neighborhood (Fulton MacGregor). It suggests that the ability to access quality services depends on whether someone is “lucky” enough to be born in a prosperous area. MacGregor, however, broached a topic my other parliamentary interviewees had not: a partial solution to the lack of sufficient resources. MacGregor

favours devolution. Devolution is the transfer of power to a lower level, in this case, from the British government in Westminster to Scottish Parliament in Holyrood.

The Scottish National Party, to which MacGregor belongs, has long fought for an independent Scotland. He contended that with Scots controlling their own finances and keeping their revenue, there would be more money to spend on things like GIRFEC implementation. And importantly, MacGregor supported the legislation. He noted that where backed with proper resources, GIRFEC was beneficial and effective (Fulton MacGregor).

At the Coalface–School Visits

Had I been told upon my selection by the Fulbright Commission that in Scotland it would be more difficult to visit schools than interview sitting Members of Scottish Parliament, I would have started emailing school officials instead of legislators last summer. That might not have helped, however, as I found schools in Scotland to be deeply protective and [I'm possibly being too on the nose here] *clannish*. To wit, I was unable to secure a single school visit on the basis of my proposed research. Every appointment I was able to make relied on someone who had a connection with the school vouching for me.

I don't fault any of those schools for being cautious about who they allow onto their campuses; in fact, it highlighted how important children's rights are in the Scottish school system. I was able to visit 4 different schools and was pleased that they represented a broad swath of communities and circumstances. They included private schools [more commonly called "independent schools" in the UK], public schools,

religious schools, high schools, elementary schools, urban schools, suburban schools and international schools. Each experience was unique in what it taught me about how schools executed GIRFEC and approached student wellness.

In an Ideal World (The International School of Aberdeen)

A former colleague from the beginning of my teaching career had moved from California to Scotland about 10 years ago, and was teaching in Aberdeen. When I reached out to him, he graciously arranged for me to visit his school and speak with the head teacher and counseling team. And so, on a gray May morning, I found myself cheerfully puffing up a hill at the end of a modest walk from my friend's flat, and finding the beautiful campus of The International School of Aberdeen.

With a student body of 500 students ranging in ages from 3-18, ISA is divided up into smaller schools within the school ("International School Aberdeen | Our Community"). I focused mainly on the secondary and middle schools. After a tour of



the impressive facilities [including an Olympic-sized indoor pool, beautifully appointed library, and a 300 seat professional theatre], I met with Angus Carmichael, head of the secondary school, and quickly got a feel for the strong sense of community built around ISA.

Carmichael, an educator with over 20 years of experience, has seen the effect of GIRFEC policies in and around the classroom. "They help with the framework [of a school wellness plan]." (Angus Carmichael). He went on to talk about how ISA approached student wellness and the ways the school safeguarded children's rights.

Most of our discussion focused on preventative measures taken to preserve wellness, or low-level interventions that could course-correct common problems for adolescents.

ISA has instituted an “advisory block” at the beginning of every school day. Students are assigned to a teacher, and meet in small groups to receive targeted help for both academic and social-emotional needs. Students needing significant academic support can be referred to the Student Support Team, consisting of the child’s teachers, an administrator, and a counselor. When extra help is not needed, the period can be used as an informal “check-in” time for teachers to get to know students better and develop closer relationships. These daily check-ins can also be utilized for sharing upcoming wellness activities the school is offering. Teachers are instructed to be observant and help identify students who might be experiencing wellness challenges. Such children are referred to the school’s Child Protection Team, which consists of the assistant principal, counselor, and nurse. The team reviews and investigates possible issues students may be having, and uses the GIRFEC framework to create support plans. The team continues to meet periodically to assess the effectiveness of the plan and revise as needed (Angus Carmichael).

Heather Barker, who is the high school counselor at IAS, believes that these teams are an important feature in the school’s overall wellness philosophy of preventative and proactive measures. When we spoke in her office, Barker pointed out the GIRFEC charts and graphics on her walls. We were also surrounded by wallet-sized pictures of every student in the secondary school, separated by grade. The smiling faces were ethnically diverse, as 45 countries are represented in the overall student body (“International School Aberdeen | Our Community”). Little touches like

that were everywhere onsite, making it apparent that staff took great pride in knowing their students as individuals.

With a price tag ranging from £11,000-20,000 for yearly tuition, ISA parents can expect a certain amount of individualized attention for their child (“International School Aberdeen | Fees and Bursaries”). Aberdeen is a truly global city, with oil companies and other international businesses, research facilities, and a well-regarded university. The community is decidedly affluent, and highly educated. Barker explained that parents were very involved and worked well with support teams. She went on to acknowledge that most of the students who needed wellness support only needed low-level interventions. Most wellness concerns she dealt with were minor to approaching moderate: garden-variety bullying, apathy, and anti-social isolation fallout from the pandemic. For children requiring more intensive interventions, such as clinical therapy, parents generally elected to arrange private outside services (Heather Barker).

For ISA, GIRFEC policies were great guidance tools to facilitate baseline wellness services. Barker felt that in particular, the framework compelled teachers to be involved with wellness monitoring in a more meaningful way (Heather Barker). And given its budgets and endowments, the school was able to fully fund the counseling positions needed, as well as the wellness activities.

Targeted Support for Success (Eastwood High School–Newton Mearns)

While it was wonderful to visit an elite school like my friend’s in Aberdeen, 95.8% of Scottish pupils are enrolled in publicly funded schools (“Facts & Figures >> SCIS”). I was grateful for my University of Strathclyde advisor’s connections to people like Nicola Kierney, who taught at Eastwood High School in Newton Mearns, a thriving

middle class suburb in between Glasgow and Renfrewshire with approximately 1,000 students (“Welcome | Eastwood High School”). An English and Drama teacher [like me], Kierney wrote a paper as a masters student in the Education Department at Strathclyde that Ms. Porciani shared with me. The topic was promoting social/emotional learning for trauma-experienced students through Drama curriculum, and hoping to see something like it in action, I reached out to the author.

While Kierney wasn’t currently working with a small group of Eastwood High students with trauma histories, she did invite me to observe a “nurture program” that helped at-risk primary students with the transition to secondary school. The program was paid for with Pupil Equity Funding, which was established nationally in 2017 to narrow the attainment gap. Allocation for PEF is based on the percentage of students who qualify for free and reduced school meals (“Pupil Equity Fund: National Operation Guidance 2022”). The roughly 3 dozen children participating in Eastwood High’s program were chosen from a variety of local primary feeder schools, selected primarily on the basis of poverty-related risk factors (Nicola Kierney).

Participation was voluntary, but Kierney reported that the response to invitations was largely positive. Primary school teachers accompanied their students on the 3 day program that ran the length of the school day. Kierney led the students through exercises that explored wellness strategies through writing, speaking, and performing. The overarching theme for the program was dealing with anxiety. At the end of the 3 days, the students came together to present performances they created for the group demonstrating the positive coping skills they had learned (Nicola Kierney).

What I found so effective about Kierney's methods was the targeted audience she was able to curate. Given the demographics of Newton Mearns ("SMID"), Eastwood High was able to offer specialized instruction for this small group of students. But what happens when a much larger proportion of children have significant wellness support needs?

Meeting A Greater Need (St. Philomena's Primary School–Glasgow)

I would observe this scenario in action at a primary school in the northeast end of Glasgow. Thanks to my Strathclyde advisor's professional connections, once again, I was able to meet with an educator actively using GIRFEC principles to promote wellness. This time it was Adele Flynn, the deputy head teacher for the Enhanced Nurture Provision at St. Philomena's Primary School. Her school has an enrollment of 250 students with two sheltered classes dedicated to helping children with wellness challenges (Adele Flynn).

Up to this point, I had only visited stately schools with tree-lined campuses, grand or modern buildings, and green grounds. When I arrived at St. Philomena's, however, I was reminded of my own primary school as a child in South Sacramento, California. Like Ethel I. Baker Elementary, SPPS is situated in an economically deprived area, and the facility reflects a community doing its best with the resources present.

Sitting with Flynn in her staff room, I could see a washer and dryer, and extra snacks for classrooms. There was a rolling clothing cart with second-hand uniforms for students who might need them. Everywhere I looked, there was evidence of educators ensuring that students had their basic needs met. I quickly discovered that Flynn's program has become the jewel of the school, and is seen as a progressive new take on

nurture strategies. Instead of isolating students in detached populations, away from mainstream classrooms, SPPS works with children exclusively on their wellness needs a few times a week so they can be part of their greater school community (Adele Flynn).

It was a privilege to be invited into the classroom with Flynn to quietly observe the class in action. Before we began the observation, she told me that there was a waiting list to get into the program and that families applied from across the city. Amongst the students, boys heavily outnumber girls (Adele Flynn). On the day I visited, an illness had gone through campus and only a small group of 8-9 year old boys were in attendance. They were playing a game of Uno, and while that might not seem like a valuable use of academic time to some, in the 20 minutes they spent playing, I watched the children practice handling big emotions like frustration, jealousy, anger, and disappointment. Done in this safe, low-stakes setting, Ms. Flynn's students could be coached through emotional struggles.

SHANARRI indicators guide the work done in the Enhanced Nurture Provision. If a student has an outburst or incident severe enough to warrant contact home, staff use SHANARRI-based graphic organizers to identify where and how the student needs support to improve outcomes. These documents become plans that measure progress on wellness or behavior goals and set timely, appropriate expectations.

Just as the SHANARRI indicators range in scope over many different areas of a child's life, the Enhanced Nurture classes employ a variety of instructional methods to better the social-emotional health of its students. Flynn is a strong proponent of the educational value of play [as observed with the Uno game], but is similarly enthusiastic about outdoor education that has children interacting with nature and agriculture.

Vocational disciplines such as cooking and mechanics are wonderful kinetic activities that may spark an interest in practical life skills. Athletics and physical education provide excellent outlets for excess energy, with physical health being a priority of overall wellness (Adele Flynn). I was most impressed with the flexible and personalized nature of Flynn's program. Looking at each child as an individual meant individualizing their instruction and care. She reported a reduction in absenteeism, as well as progress in positive behavior for her students.

The Tragedy of Triage (*Clyde Primary School–Clydebank, Glasgow*)

In my last week in Glasgow, I was lucky enough to secure one more school visit through another of my advisor's connections. This time, I went to Clyde Primary School, a public, non-secular elementary near the Clydebank area of Glasgow in a neighborhood called Yoker ("About Our School | Clyde Primary"). Yoker, like many neighborhoods in the area, has its roots in shipbuilding but fell into sharp decline when the industry evaporated. Poverty and slums followed in the form of high-rise council flats. Such buildings have only in the last 20 years been phased out, being knocked down and replaced with nicer homes ("Neighbourhood Profiles | The Glasgow Indicators Project.").

Many of the some 350 students who attend Clyde Primary School are from families of generational poverty. In fact, the Scottish government reports that as of 2022, more than 1 in 4 children in that catchment [the area where state funded schools must accept residents as students] live in poverty (Whyte). These issues were the main topic of conversation when I met with Scott Mowat, head teacher of CPS.

Mowat confirmed that 67% of his students qualified as “deprived.” Many of the wellness challenges they faced were drug and/or addiction related. Parents might be absent because of health problems associated with drugs, or because they are in jail for crimes connected with drug use. If they aren’t physically absent, they may well be emotionally or pastorally absent, creating abuse in the form of neglect (Scott Mowat).

To even hope to begin addressing these problems in an effective way, Mowat believes that schools and social workers “need to have a team approach” (Scott Mowat). This is especially true for students who are under CSOs [Compulsory Supervision Orders, where a court determines that social workers must be involved in ensuring children are looked after and cared for] (Compulsory Supervision Orders). Social workers have the legal decision-making authority for children’s wellness, but teachers and school staff are often the eyes and ears that provide crucial information to make those decisions.

Unfortunately, my discussion with Mowat echoed what Adele Flynn said at St. Philomena’s: deprived areas have seen a decline in services since the COVID 19 pandemic (Scott Mowat). Not only are the needs for such services higher than before, there are fewer social workers and funds to go around. Special pandemic funding has run out, and even when there *is* the money to increase staffing, positions often go unfilled, as the number of qualified social workers in Scotland dwindles.

“At one point, we had a social worker assigned *just* to our school,” said Mowat with an edge of quiet frustration, “but now we share one with 6 other schools” (Scott Mowat). He went on to explain that the social worker was forced to triage issues facing

children and deal with the most severe problems first. The unwanted byproduct of this strategy is that moderate issues are not tackled until they become major ones.

In the interim, schools like Clyde Primary do what they can to bridge the gap. Mowat insists that the foundation of that bridge are the relationships he encourages his staff to make with children. “It’s so important that they have a trusted adult here” (Scott Mowat). Indeed, in some instances, it may be the only person like that in their lives.

Getting It Right in California: Practical Uses and Conclusions

With every conversation, every school visit, and throughout every reading, my exploration of Getting Right for Every Child was a search for structures and strategies that could be useful in my home setting of Northern California. Often, my thought process would funnel ideas into one of two categories: 1) Oooo, we could DO that! Or 2) Americans would never go for that.

I had to challenge myself to dig deeper into the possibilities. Not everything that falls into category 2 is necessarily impossible. Some things would have to be massaged into slightly different versions of Scottish policies. Americans don’t have a national, socialized healthcare system, but they might be persuaded to centralize certain services if it was presented as local/regional, more efficient, and with faster access to resources. Certainly, my research indicates that there are tremendous benefits from schools having a close relationship with social care services in their area.

Regional area governing agencies known as districts have a similar impact on policy as do Scottish council boards. These groups have the authority to implement policies. My own River Delta Unified School District could easily adopt the use of SHANARRI style indicators to monitor student wellness. A mixed mainstream/sheltered

classroom for students with specific wellness needs could be piloted at one of our four elementary schools. Transition workshops that focus on socioemotional health could be introduced as offerings from our two high schools.

Even though the Bay Area's overall population of approximately 7.75 million people is more than the entirety of Scotland I still feel that the two places have much in common, especially when focusing on my small corner of it. The California Delta is rich in agriculture, with sheep farming being a proud part of the local culture. Indeed, my



³school's mascot is the Rams. Scotland has more sheep than people ("Livestock: Results from the Scottish Agricultural Census"), and the mix of very rural areas in close proximity to larger urban settings is very similar to the Delta's geographical layout.

I am hopeful that especially the classroom-level instruction and interventions that I saw during my in-country stay can find fertile ground with my colleagues and administration. But more than the

practical uses, I will be advocating for a Scottish inspired pedagogical approach to wellness that is flexible and child-centered. I truly believe that this is the best way to get kids what they need and have the most potential for overall success in life.

³ The author meets a Scottish ram

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Getting *Getting It Right* Right:

An American Teacher's Discoveries On Scotland's Approach to
Student Wellness



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Getting It Right as a Teacher: My Prologue

When I became a teacher in 2003, I had the simple belief that there were two main qualities needed to be a good teacher. The first was knowing your “stuff” [my “stuff” was English and Drama], and the second was liking kids. Believing I was set in those two categories, I entered my profession with the sort of breezy confidence only a 23 year old college graduate could manage. The learning curve was steep.

Quickly, I realized that my teaching tool kit needed to be a lot bigger, and a lot more sophisticated. The “stuff” I needed to know extended well past my curriculum, as my students were lacking in so many other areas besides Shakespearean analysis and grammar usage. “Liking kids” was easy enough; but it didn’t necessarily help them. Beyond merely having affection for them, I needed to advocate for them.

At the start of my career, the most common cause for additional educational support among my students was Attention Deficit Hyperactivity Disorder. The protocols for addressing these concerns were generally clear and easy to navigate. If parents were unaware of their students’ focusing issues [or befuddled by them], alerting them to such predicaments was fairly straightforward. Teachers such as myself felt comfortable sitting in a parent meeting and approaching topics like ADHD.

As the years pass, these types of challenges are being addressed sooner in a child’s life, and becoming less of a concern by high school. Replacing and exceeding them are struggles with anxiety, depression, and personality disorders—issues that lack clear protocols. In the last decade in particular, I have seen these problems increase heavily amongst my students, and I have witnessed one after the other grapple with panic attacks, disordered eating, self-harm, addiction, and the psychological trauma

resulting from bullying, bigotry, and racism. The fallout has often included poor school performance and absenteeism, with lasting negative effects in students' lives. Sadly, the repercussions could be even more dire, as I have attended more than one funeral as a result of suicide or addiction.

As I found very little structured guidance to address the growing crisis with juvenile mental and emotional health in my home state of California, I began researching how it was being addressed elsewhere. The goal was to discover central practices that could be applied in common settings such as school sites and districts. This is how I first learned about Scotland's initiative, "Getting It Right For Every Child."

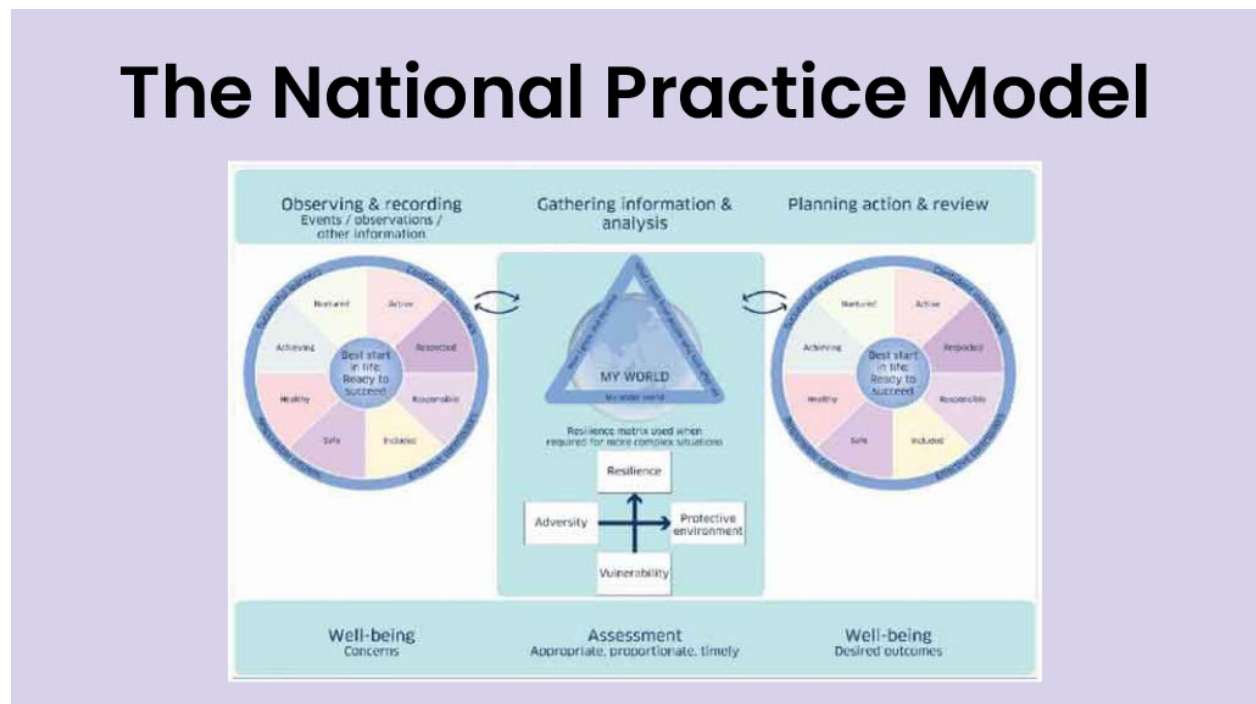
The "Rights" in Getting It Right: Background

For many decades, Scotland has aligned its childrens' policies on The United Nations Convention on the Rights of the Child [CRC]. This treatise, first written in 1989 and periodically revised, has been ratified by 194 countries (Davies). Notably, the United States is the only industrialized country to abstain, with American oppositionists consistently citing state and federal sovereignty as an obstacle to ratification (Congressional Research Service). The CRC shapes Scottish policy that prioritizes a child's wellbeing to this day.

Prior to GIRFEC, Scotland's educational schemes were guided by a program known as the "5-14/Curriculum for Excellence," dating back to the late 1980's. "5-14" referenced the targeted ages of the children being served (Malcom). As the efficacy of this curriculum was being assessed in the late 90's, it was determined that, while the program introduced the concepts of whole-child advocacy, it didn't go far enough. In

2004, a review of the Children’s Hearing system [the entity that deals with juvenile criminal matters] found that in order to decrease the number of children in the system, the country’s at-risk children needed a more proactive approach to safeguard their wellness. Consequently, in 2006 the Scotch government published the proposed implementation of a sweeping set of reforms for all children’s services. A whole system overhaul would tie in all the ways that the government planned to ensure the rights of Scottish children: health care, education, juvenile justice, and the social care sector. Two years after the initial publication of its framework, Getting It Right For Every Child was implemented across Scotland (“Policy–Getting It Right for Every Child”).

Hitting the Runway: The Framework of GIRFEC



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¹ All GIRFEC graphics are published from the Scottish Government, as cited in the Works Cited page

The template for implementing this system was laid out with the National Practice Model. It was designed with the intention of being a strong framework with ample flexibility of application to serve the unique needs of the children in various areas.

Crucial to GIRFEC was the precept that the child must be central in all decisions made in their interest. The aim was a more direct, effective line of communication between care providers, schools, community resources, and families. Empowering parents and guardians to better care for their children was a primary goal in order to reduce the number of children in the courts and in the care systems. Expected results included more consistent practices nationwide, streamlined services and shorter lag times to access resources, earlier educational and social care interventions, a reduction in the attainment gap, and higher rates of positive destinations after schooling (“Policy–Getting It Right For Every Child”). Ultimately, Getting It Right for Every Child aspired to eliminate barriers to wellness before they became problems, and to address problems earlier and more effectively.

With this came the principle that a child’s overall wellness should be regularly monitored through standardized measures and values. Parents would be primarily responsible for protecting their children’s rights, joined as a team by health care professionals, educators, and social workers, as the child’s age and circumstances determine (“Policy–Getting It Right For Every Child”). The National Practice Model, a primer on how to apply GIRFEC, established a sequence of procedures to assess and address wellness concerns in a child’s life.

8 “Wellness Indicators” were identified for this purpose, stating that all children should be: Safe, Healthy, Active, Nurtured, Achieving, Respected, Responsible, and

Included [SHANARRI]. Children’s wellness would be monitored on the basis of the



indicators, and concerns would trigger information gathering based on further criteria from the My World Triangle, and the Resiliency Matrix.

When it was suspected that extra help was needed, the My World Triangle precepts were intended to identify where support could be applied in a child’s life. Stressing the importance of positivity, this approach would highlight and utilize strengths in a

child’s world, while also measuring and exploring the risks and needs uncovered.

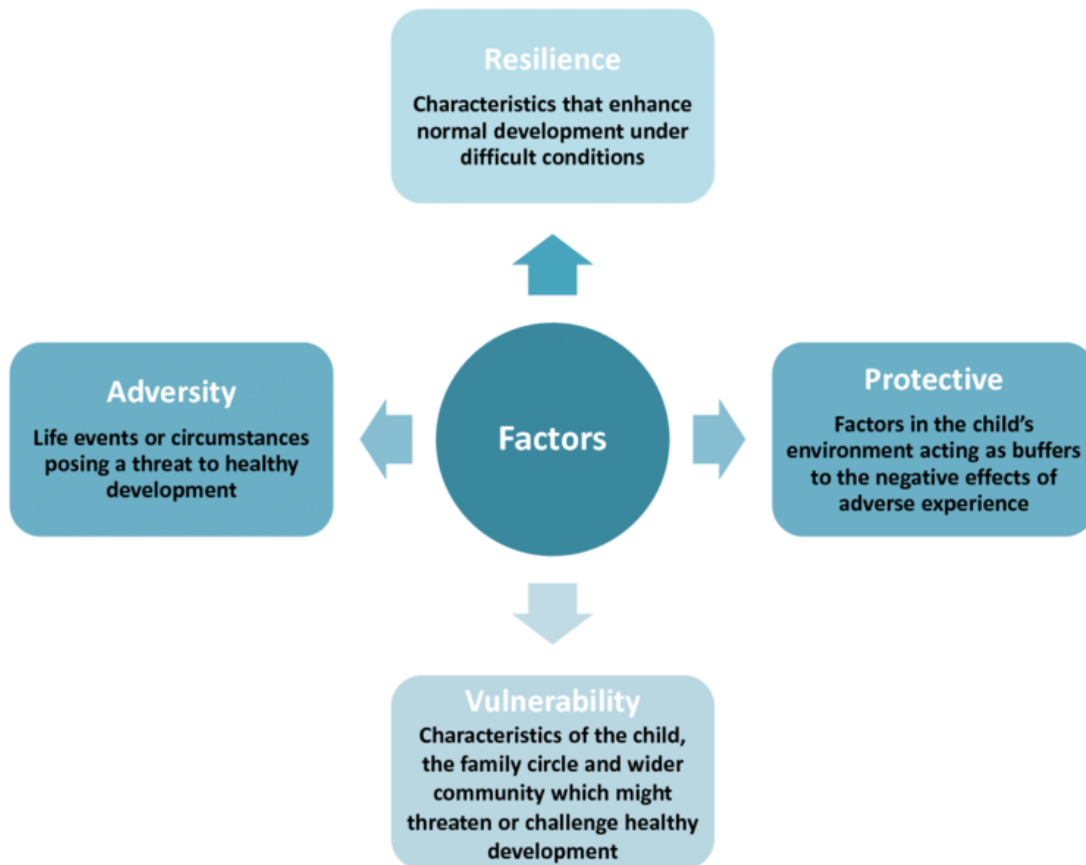
Reinforcing the idea that the child herself must be at the center of all decisions made about her, the My World Triangle represents the connections made between different parts of the child’s world (“Policy–Getting Right For Every Child”). Factors that would be considered include aspects of homelife, educational circumstances, medical/physical health challenges, and social hazards such as poverty, discrimination, and other Adverse Childhood Experiences.

This interconnected, multifaceted look at the child’s world was meant to provide more precision as to where and how support might be beneficial. It would also underscore the importance of how various elements of a child’s wellbeing are often deeply intertwined.

Once a concern was voiced, and needs were identified, the Resilience Matrix would then explore the present ability of the child to negotiate the challenges in their life. The risks and threats to the child’s wellness would be weighed against the positive

buffers (“Publication–Advice and Guidance”). For instance, a child who rarely saw their working single parent may be better positioned to handle social problems such as bullying if they have close, involved extended family nearby or a teacher they trusted. The purpose of the Matrix was to determine the urgency of the intervention needed, and the magnitude of the intervention.

Wellness plans could then be created that would be assessed for effectiveness using the aforementioned SHANARRI Indicators. This cyclical process could then be repeated as needed.



Getting It Right for Parents' Rights: The Named Person Controversy

The GIRFEC rollout was not without its controversies. A prominent feature of the plan was The Named Person. The Named Person was someone assigned to observe and support the child as an objective advocate. From birth to school age, the Named Person was usually a General Practitioner or other medical personnel. A school aged child's Named Person was typically a teacher or school official. Social workers could also be assigned to this role ("Practice Guidance: The Role of the Named Person").

Implementation of this feature was intended to begin in 2014, but was met with significant opposition from parent rights' groups who worried that The Named Person would be a major overstep of the government. They saw the assignment of an outside figure who had access to a child's records as an infringement on their privacy as well as treading on the sovereign rights of parents. There was confusion about whether or not the Named Person program was compulsory, with conflicting information being supplied by different government officials. The policy was placed on hold while it traveled through the courts, first being upheld in the Scottish courts, but later being deemed unlawful by the UK Supreme Court. Ultimately, in 2019 the Named Person program became a voluntary offering to the council areas and parents who wished to use it. All legislation intended to enshrine it as mandatory was rescinded ("Named Person Scheme Scrapped By Scottish Government").

Ceud Mile Fàilte²: A Practical Introduction

I arrived in Scotland at the end of March 2023, knowing as much about GIRFEC as I could glean from government websites and a few academic journals I had been

² Scottish Gaelic: "One hundred thousand welcomes"

steered towards. Within 48 hours, I was sitting in the Education Department at the University of Strathclyde, across from my faculty advisor, Monica Porciani. Her warm welcome included a primer on what I would find to be true in my school visits and interviews with experts: GIRFEC is strong in theory, but has yet to achieve true consistency in application. Porciani's background is in public health, and among her areas of expertise are pupil wellbeing and teacher training as it pertains to wellness ("Ms. Monica Porciani").

The Bigger Picture: Legislator Interviews

Kaukab Stewart—Scottish National Party MSP for Glasgow Kelvin

Stewart was the first MSP to respond to me. She agreed to an interview about GIRFEC before I even arrived in Scotland. I was eager to hear her perspectives on the policies for many reasons. She was a teacher in Glasgow for over 30 years, bringing an intimate understanding of education in Scotland that few other politicians can match. She was also the first woman of color elected to Scottish Parliament, and that, combined with the pockets of diverse and deprived populations in her constituency, made her an authentic representative of marginalized groups (Kaukab Stewart | Scottish Parliament).

Our discussion gave me valuable insight on how legislation can be formed from data and how it moves through the system. The conversation was focused on how GIRFEC was being used to help Scottish schools succeed. A former Deputy Convener of the Education Children & Young People Committee, and the current Convener of the Equality, Human Rights & Civil Justice Committee, Kaukab was keenly situated to

educate me on the ways GIRFEC can, is, and could be providing equity of services and opportunities to Scottish children (Kaukab Stewart | Scottish Parliament).

She encouraged me to investigate the Scottish Attainment Challenge. It was created in 2015 with the goal of “achieving equity in educational outcomes, with a particular focus on closing the poverty-related attainment gap” (“Scottish Attainment Challenge”). The rate of students who matriculate into successful and positive post-education destinations is historically far lower among deprived children. Stewart accentuated GIRFEC principles as a key part of the design process for government initiatives like the SAC, and the development of Pupil Equity Funding to achieve these goals. PEF allocates government funds directly to schools with high poverty rates to be spent however the school determines will help close the gap and foster wellness among all students (“Pupil Attainment: Closing the Gap”).

When I asked Ms. Stewart what the greatest barriers to Scottish children’s wellness were, she thought carefully before citing post-pandemic issues and the cost of living crisis. Anyone working in schools or caring for children can understand her concerns. Parent surveys conducted by the Scotch government reveal that up to 50% of the country’s children have experienced a decline in mental wellbeing. Loneliness, anxiety, depression, and isolation rates all spiked since 2020. Stewarts’ citation of economic distress also rings true, as the same data reported the wellbeing of children in deprived populations suffered worse than their more affluent peers (“Scotland’s Wellbeing”).

A lack of resources is the practical problem that GIRFEC designers have yet to solve. Parents and educators alike were mostly enthusiastic at the introduction of the



National Practice Model. In the years that followed, however, the disparities between well-funded schools and those in deprived areas became apparent. Affluent schools can appropriately staff counseling and nursing positions. Affluent schools can offer smaller class sizes and more support staff for the classroom. Affluent schools generally work from a more manageable baseline

of student wellness than their lower class counterparts. While the principles are the same everywhere, in practice, students have not experienced an equitable execution of the policies. And it has not gone unnoticed.

“There is a weariness.. a cynicism.. that has developed for some of our communities,” said Stewart of the uneven application of GIRFEC (Kaukab Stewart). Stewart represents the Glasgow Kelvin constituency, an area with both incredibly prosperous and deeply deprived neighborhoods. She went on to acknowledge that communities with high rates of poverty experienced a more profound lack of confidence in school systems. But, she continued, “we need to resist the urge to get rid of it [GIRFEC], because the theory is sound.” She emphasized that the upcoming 2023 review of the policies should identify places where practical disparities can be mended.

Ross Greer—Scottish Greens MSP for West Scotland

I knew that I would learn volumes about student wellness from Kaukab Stewart, who had decades of classroom experience, and a history of activism. I was surprised, however, by my next legislator interviewee, and how much he knew about education and children. Ross Greer, Scotland’s youngest ever elected Member of Parliament, was a rapid-fire cannon of knowledge. I requested an interview with him because his name kept popping up in my research of Parliament and GIRFEC. In hearings and committees, it seemed that Ross Greer was a near constant fixture, asking thoughtful questions, and engaging in meaningful discourse.

Greer, not yet 30, has demonstrated clearly that “young” does not always mean “inexperienced.” In his 7 years tenure as a Member of Scottish Parliament, he has



served on 9 committees. Not only has he served as his Scottish Greens party spokesperson on Education since his first election in 2016, he has also served on the Education and Skills committee [not to be confused with the Education, Children & Young People Committee... on which he serves currently] (“Ross Greer | Scottish Parliament”).

It was a busy day for Greer when he sat down at Holyrood to talk GIRFEC with me. Echoing Stewart’s sentiment that the principles and theory of GIRFEC was strong, he too cited funding as the missing key that would unlock the “every child” aspect of the

policies. But because GIRFEC was envisioned as such a sweeping reform, its scope, and therefore price tag, is immense. “It’s ambitious,” admitted Greer, noting that the designers of the initiative did not include a way to pay for all the support necessary to execute it properly, and that appropriate funding should be secured (Ross Greer).

Allowing that, he believed that the next step for GIRFEC was expansion, citing the needs of trans and queer children, whose wellness data reflects a shameful disparity with their heteronormative peers. Greer also spoke of a greater emphasis on government protections for the environment, as one of the sources of anxiety in young people is climate change. We finished our brisk but information packed discussion as he spoke excitedly on the positive effect a planned overhaul of the Scottish testing system could have on overall wellness, and on student achievement, one of the main GIRFEC principles (Ross Greer).

Fulton MacGregor—Scottish National Party MSP for Coatbridge & Chryston

Funding was again the main topic of discussion when I met with Fulton MacGregor, a Scottish National Party MSP representing Coatbridge & Chryston (“Fulton MacGregor | Scottish Parliament”). MacGregor, whose legislative record shows a history of Social Justice and Human Rights activism, lamented the reality of what Scots call “The Postcode Lottery,” a term used to describe the disparity of services from neighborhood to neighborhood (Fulton MacGregor). It suggests that the ability to access quality services depends on whether someone is “lucky” enough to be born in a prosperous area. MacGregor, however, broached a topic my other parliamentary interviewees had not: a partial solution to the lack of sufficient resources. MacGregor

favors devolution. Devolution is the transfer of power to a lower level, in this case, from the British government in Westminster to Scottish Parliament in Holyrood.

The Scottish National Party, to which MacGregor belongs, has long fought for an independent Scotland. He contended that with Scots controlling their own finances and keeping their revenue, there would be more money to spend on things like GIRFEC implementation. And importantly, MacGregor supported the legislation. He noted that where backed with proper resources, GIRFEC was beneficial and effective (Fulton MacGregor).

At the Coalface–School Visits

Had I been told upon my selection by the Fulbright Commission that in Scotland it would be more difficult to visit schools than interview sitting Members of Scottish Parliament, I would have started emailing school officials instead of legislators last summer. That might not have helped, however, as I found schools in Scotland to be deeply protective and [I'm possibly being too on the nose here] *clannish*. To wit, I was unable to secure a single school visit on the basis of my proposed research. Every appointment I was able to make relied on someone who had a connection with the school vouching for me.

I don't fault any of those schools for being cautious about who they allow onto their campuses; in fact, it highlighted how important children's rights are in the Scottish school system. I was able to visit 4 different schools and was pleased that they represented a broad swath of communities and circumstances. They included private schools [more commonly called "independent schools" in the UK], public schools,

religious schools, high schools, elementary schools, urban schools, suburban schools and international schools. Each experience was unique in what it taught me about how schools executed GIRFEC and approached student wellness.

In an Ideal World (The International School of Aberdeen)

A former colleague from the beginning of my teaching career had moved from California to Scotland about 10 years ago, and was teaching in Aberdeen. When I reached out to him, he graciously arranged for me to visit his school and speak with the head teacher and counseling team. And so, on a gray May morning, I found myself cheerfully puffing up a hill at the end of a modest walk from my friend's flat, and finding the beautiful campus of The International School of Aberdeen.

With a student body of 500 students ranging in ages from 3-18, ISA is divided up into smaller schools within the school ("International School Aberdeen | Our Community"). I focused mainly on the secondary and middle schools. After a tour of



the impressive facilities [including an Olympic-sized indoor pool, beautifully appointed library, and a 300 seat professional theatre], I met with Angus Carmichael, head of the secondary school, and quickly got a feel for the strong sense of community built around ISA.

Carmichael, an educator with over 20 years of experience, has seen the effect of GIRFEC policies in and around the classroom. "They help with the framework [of a school wellness plan]." (Angus Carmichael). He went on to talk about how ISA approached student wellness and the ways the school safeguarded children's rights.

Most of our discussion focused on preventative measures taken to preserve wellness, or low-level interventions that could course-correct common problems for adolescents.

ISA has instituted an “advisory block” at the beginning of every school day. Students are assigned to a teacher, and meet in small groups to receive targeted help for both academic and social-emotional needs. Students needing significant academic support can be referred to the Student Support Team, consisting of the child’s teachers, an administrator, and a counselor. When extra help is not needed, the period can be used as an informal “check-in” time for teachers to get to know students better and develop closer relationships. These daily check-ins can also be utilized for sharing upcoming wellness activities the school is offering. Teachers are instructed to be observant and help identify students who might be experiencing wellness challenges. Such children are referred to the school’s Child Protection Team, which consists of the assistant principal, counselor, and nurse. The team reviews and investigates possible issues students may be having, and uses the GIRFEC framework to create support plans. The team continues to meet periodically to assess the effectiveness of the plan and revise as needed (Angus Carmichael).

Heather Barker, who is the high school counselor at IAS, believes that these teams are an important feature in the school’s overall wellness philosophy of preventative and proactive measures. When we spoke in her office, Barker pointed out the GIRFEC charts and graphics on her walls. We were also surrounded by wallet-sized pictures of every student in the secondary school, separated by grade. The smiling faces were ethnically diverse, as 45 countries are represented in the overall student body (“International School Aberdeen | Our Community”). Little touches like

that were everywhere onsite, making it apparent that staff took great pride in knowing their students as individuals.

With a price tag ranging from £11,000-20,000 for yearly tuition, ISA parents can expect a certain amount of individualized attention for their child (“International School Aberdeen | Fees and Bursaries”). Aberdeen is a truly global city, with oil companies and other international businesses, research facilities, and a well-regarded university. The community is decidedly affluent, and highly educated. Barker explained that parents were very involved and worked well with support teams. She went on to acknowledge that most of the students who needed wellness support only needed low-level interventions. Most wellness concerns she dealt with were minor to approaching moderate: garden-variety bullying, apathy, and anti-social isolation fallout from the pandemic. For children requiring more intensive interventions, such as clinical therapy, parents generally elected to arrange private outside services (Heather Barker).

For ISA, GIRFEC policies were great guidance tools to facilitate baseline wellness services. Barker felt that in particular, the framework compelled teachers to be involved with wellness monitoring in a more meaningful way (Heather Barker). And given its budgets and endowments, the school was able to fully fund the counseling positions needed, as well as the wellness activities.

Targeted Support for Success (Eastwood High School–Newton Mearns)

While it was wonderful to visit an elite school like my friend’s in Aberdeen, 95.8% of Scottish pupils are enrolled in publicly funded schools (“Facts & Figures >> SCIS”). I was grateful for my University of Strathclyde advisor’s connections to people like Nicola Kierney, who taught at Eastwood High School in Newton Mearns, a thriving

middle class suburb in between Glasgow and Renfrewshire with approximately 1,000 students (“Welcome | Eastwood High School”). An English and Drama teacher [like me], Kierney wrote a paper as a masters student in the Education Department at Strathclyde that Ms. Porciani shared with me. The topic was promoting social/emotional learning for trauma-experienced students through Drama curriculum, and hoping to see something like it in action, I reached out to the author.

While Kierney wasn’t currently working with a small group of Eastwood High students with trauma histories, she did invite me to observe a “nurture program” that helped at-risk primary students with the transition to secondary school. The program was paid for with Pupil Equity Funding, which was established nationally in 2017 to narrow the attainment gap. Allocation for PEF is based on the percentage of students who qualify for free and reduced school meals (“Pupil Equity Fund: National Operation Guidance 2022”). The roughly 3 dozen children participating in Eastwood High’s program were chosen from a variety of local primary feeder schools, selected primarily on the basis of poverty-related risk factors (Nicola Kierney).

Participation was voluntary, but Kierney reported that the response to invitations was largely positive. Primary school teachers accompanied their students on the 3 day program that ran the length of the school day. Kierney led the students through exercises that explored wellness strategies through writing, speaking, and performing. The overarching theme for the program was dealing with anxiety. At the end of the 3 days, the students came together to present performances they created for the group demonstrating the positive coping skills they had learned (Nicola Kierney).

What I found so effective about Kierney's methods was the targeted audience she was able to curate. Given the demographics of Newton Mearns ("SMID"), Eastwood High was able to offer specialized instruction for this small group of students. But what happens when a much larger proportion of children have significant wellness support needs?

Meeting A Greater Need (St. Philomena's Primary School–Glasgow)

I would observe this scenario in action at a primary school in the northeast end of Glasgow. Thanks to my Strathclyde advisor's professional connections, once again, I was able to meet with an educator actively using GIRFEC principles to promote wellness. This time it was Adele Flynn, the deputy head teacher for the Enhanced Nurture Provision at St. Philomena's Primary School. Her school has an enrollment of 250 students with two sheltered classes dedicated to helping children with wellness challenges (Adele Flynn).

Up to this point, I had only visited stately schools with tree-lined campuses, grand or modern buildings, and green grounds. When I arrived at St. Philomena's, however, I was reminded of my own primary school as a child in South Sacramento, California. Like Ethel I. Baker Elementary, SPPS is situated in an economically deprived area, and the facility reflects a community doing its best with the resources present.

Sitting with Flynn in her staff room, I could see a washer and dryer, and extra snacks for classrooms. There was a rolling clothing cart with second-hand uniforms for students who might need them. Everywhere I looked, there was evidence of educators ensuring that students had their basic needs met. I quickly discovered that Flynn's program has become the jewel of the school, and is seen as a progressive new take on

nurture strategies. Instead of isolating students in detached populations, away from mainstream classrooms, SPPS works with children exclusively on their wellness needs a few times a week so they can be part of their greater school community (Adele Flynn).

It was a privilege to be invited into the classroom with Flynn to quietly observe the class in action. Before we began the observation, she told me that there was a waiting list to get into the program and that families applied from across the city. Amongst the students, boys heavily outnumber girls (Adele Flynn). On the day I visited, an illness had gone through campus and only a small group of 8-9 year old boys were in attendance. They were playing a game of Uno, and while that might not seem like a valuable use of academic time to some, in the 20 minutes they spent playing, I watched the children practice handling big emotions like frustration, jealousy, anger, and disappointment. Done in this safe, low-stakes setting, Ms. Flynn's students could be coached through emotional struggles.

SHANARRI indicators guide the work done in the Enhanced Nurture Provision. If a student has an outburst or incident severe enough to warrant contact home, staff use SHANARRI-based graphic organizers to identify where and how the student needs support to improve outcomes. These documents become plans that measure progress on wellness or behavior goals and set timely, appropriate expectations.

Just as the SHANARRI indicators range in scope over many different areas of a child's life, the Enhanced Nurture classes employ a variety of instructional methods to better the social-emotional health of its students. Flynn is a strong proponent of the educational value of play [as observed with the Uno game], but is similarly enthusiastic about outdoor education that has children interacting with nature and agriculture.

Vocational disciplines such as cooking and mechanics are wonderful kinetic activities that may spark an interest in practical life skills. Athletics and physical education provide excellent outlets for excess energy, with physical health being a priority of overall wellness (Adele Flynn). I was most impressed with the flexible and personalized nature of Flynn's program. Looking at each child as an individual meant individualizing their instruction and care. She reported a reduction in absenteeism, as well as progress in positive behavior for her students.

The Tragedy of Triage (*Clyde Primary School–Clydebank, Glasgow*)

In my last week in Glasgow, I was lucky enough to secure one more school visit through another of my advisor's connections. This time, I went to Clyde Primary School, a public, non-secular elementary near the Clydebank area of Glasgow in a neighborhood called Yoker ("About Our School | Clyde Primary"). Yoker, like many neighborhoods in the area, has its roots in shipbuilding but fell into sharp decline when the industry evaporated. Poverty and slums followed in the form of high-rise council flats. Such buildings have only in the last 20 years been phased out, being knocked down and replaced with nicer homes ("Neighbourhood Profiles | The Glasgow Indicators Project.").

Many of the some 350 students who attend Clyde Primary School are from families of generational poverty. In fact, the Scottish government reports that as of 2022, more than 1 in 4 children in that catchment [the area where state funded schools must accept residents as students] live in poverty (Whyte). These issues were the main topic of conversation when I met with Scott Mowat, head teacher of CPS.

Mowat confirmed that 67% of his students qualified as “deprived.” Many of the wellness challenges they faced were drug and/or addiction related. Parents might be absent because of health problems associated with drugs, or because they are in jail for crimes connected with drug use. If they aren’t physically absent, they may well be emotionally or pastorally absent, creating abuse in the form of neglect (Scott Mowat).

To even hope to begin addressing these problems in an effective way, Mowat believes that schools and social workers “need to have a team approach” (Scott Mowat). This is especially true for students who are under CSOs [Compulsory Supervision Orders, where a court determines that social workers must be involved in ensuring children are looked after and cared for] (Compulsory Supervision Orders). Social workers have the legal decision-making authority for children’s wellness, but teachers and school staff are often the eyes and ears that provide crucial information to make those decisions.

Unfortunately, my discussion with Mowat echoed what Adele Flynn said at St. Philomena’s: deprived areas have seen a decline in services since the COVID 19 pandemic (Scott Mowat). Not only are the needs for such services higher than before, there are fewer social workers and funds to go around. Special pandemic funding has run out, and even when there *is* the money to increase staffing, positions often go unfilled, as the number of qualified social workers in Scotland dwindles.

“At one point, we had a social worker assigned *just* to our school,” said Mowat with an edge of quiet frustration, “but now we share one with 6 other schools” (Scott Mowat). He went on to explain that the social worker was forced to triage issues facing

children and deal with the most severe problems first. The unwanted byproduct of this strategy is that moderate issues are not tackled until they become major ones.

In the interim, schools like Clyde Primary do what they can to bridge the gap. Mowat insists that the foundation of that bridge are the relationships he encourages his staff to make with children. "It's so important that they have a trusted adult here" (Scott Mowat). Indeed, in some instances, it may be the only person like that in their lives.

Getting It Right in California: Practical Uses and Conclusions

With every conversation, every school visit, and throughout every reading, my exploration of Getting Right for Every Child was a search for structures and strategies that could be useful in my home setting of Northern California. Often, my thought process would funnel ideas into one of two categories: 1) Oooo, we could DO that! Or 2) Americans would never go for that.

I had to challenge myself to dig deeper into the possibilities. Not everything that falls into category 2 is necessarily impossible. Some things would have to be massaged into slightly different versions of Scottish policies. Americans don't have a national, socialized healthcare system, but they might be persuaded to centralize certain services if it was presented as local/regional, more efficient, and with faster access to resources. Certainly, my research indicates that there are tremendous benefits from schools having a close relationship with social care services in their area.

Regional area governing agencies known as districts have a similar impact on policy as do Scottish council boards. These groups have the authority to implement policies. My own River Delta Unified School District could easily adopt the use of SHANARRI style indicators to monitor student wellness. A mixed mainstream/sheltered

classroom for students with specific wellness needs could be piloted at one of our four elementary schools. Transition workshops that focus on socioemotional health could be introduced as offerings from our two high schools.

Even though the Bay Area's overall population of approximately 7.75 million people is more than the entirety of Scotland I still feel that the two places have much in common, especially when focusing on my small corner of it. The California Delta is rich in agriculture, with sheep farming being a proud part of the local culture. Indeed, my



³school's mascot is the Rams. Scotland has more sheep than people ("Livestock: Results from the Scottish Agricultural Census"), and the mix of very rural areas in close proximity to larger urban settings is very similar to the Delta's geographical layout.

I am hopeful that especially the classroom-level instruction and interventions that I saw during my in-country stay can find fertile ground with my

colleagues and administration. But more than the

practical uses, I will be advocating for a Scottish inspired pedagogical approach to wellness that is flexible and child-centered. I truly believe that this is the best way to get kids what they need and have the most potential for overall success in life.

³ The author meets a Scottish ram

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The author of this paper is an alum of the Fulbright Distinguished Awards in Teaching Research Program, a program sponsored by the U.S. Department of State’s Bureau of Educational and Cultural Affairs (ECA) with funding provided by the U.S. Government and administered by IREX.

The views and information presented are the author’s own and do not represent the U.S.

Department of State, the Fulbright Program, or IREX.

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: X

From: Codi Agan, Director of Personnel

Item Number: 9.2.2.1

Type of item: Information Only

SUBJECT:

Employee J-1 Visa Opportunities

BACKGROUND:

On February 21, 2023, it was approved for the River Delta Unified School District to enter into an agreement with the California Department of Education (CDE), the Ministry of Education & Vocational Training of Spain to hire an employee with a J-1 Visa through the Exchange Visitor Program for Teachers. This program allows 40 participants each year and our District was the recipient of one.

To help the filling of open teaching positions in the District, at the November 12, 2023, Board Meeting, it was requested by the Board of Trustee to ascertain information on the sponsorship requirements under J-1 Visas for potential employees.

STATUS:

The Director of Personnel, Codi Agan, and other Cabinet staff members researched the requirements to sponsor potential employees through the J-1 Visa process. It has been determined that the process has many paths and needs further investigation and research to determine the feasibility of hiring under this process.

PRESENTER:

Katherine Wright, Superintendent

OTHER PEOPLE WHO MIGHT BE PRESENT:

Staff

COST AND FUNDING SOURCES:

No cost to research J-1 Visa requirements.

RECOMMENDATION:

That the Board receives the information and holds a discussion if necessary.

Time allocated: 5 minutes

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: X

From: Tammy Busch, Asst. Superintendent of Business Services Item Number: 9.3.1.1

Type of item: (Action, Consent Action or Information Only): Information Only

SUBJECT: Monthly Enrollment and ADA Report (NOVEMBER MONTH 4)

BACKGROUND:

Each month district staff compiles attendance and enrollment data for all school sites. The attached summary shows enrollment and ADA for 2022-2023 compared to current year 2023-2024.

STATUS:

District-wide enrollment **decreased by 43** students compared to the same month of school year 2022-23, decreasing from 1,779 to 1,736 (does not include Adult Ed).

District-wide enrollment **decreased by 1 student** compared to **last month** from 1,737 to 1,736. (Does not include Adult Ed)

District-wide attendance **increased by 21 ADA** compared to the same month of school year, 2022-23, decreasing from 1,638 to 1,595 (does not include Adult Ed).

District-wide attendance **decreased by 3 ADA** compared to **last month**, from 1,595 to 1,592 (Does not include Adult Ed)

PRESENTER:

Tammy Busch, Asst. Superintendent of Business Services

OTHER PEOPLE WHO MIGHT BE PRESENT:

COST AND FUNDING SOURCES:

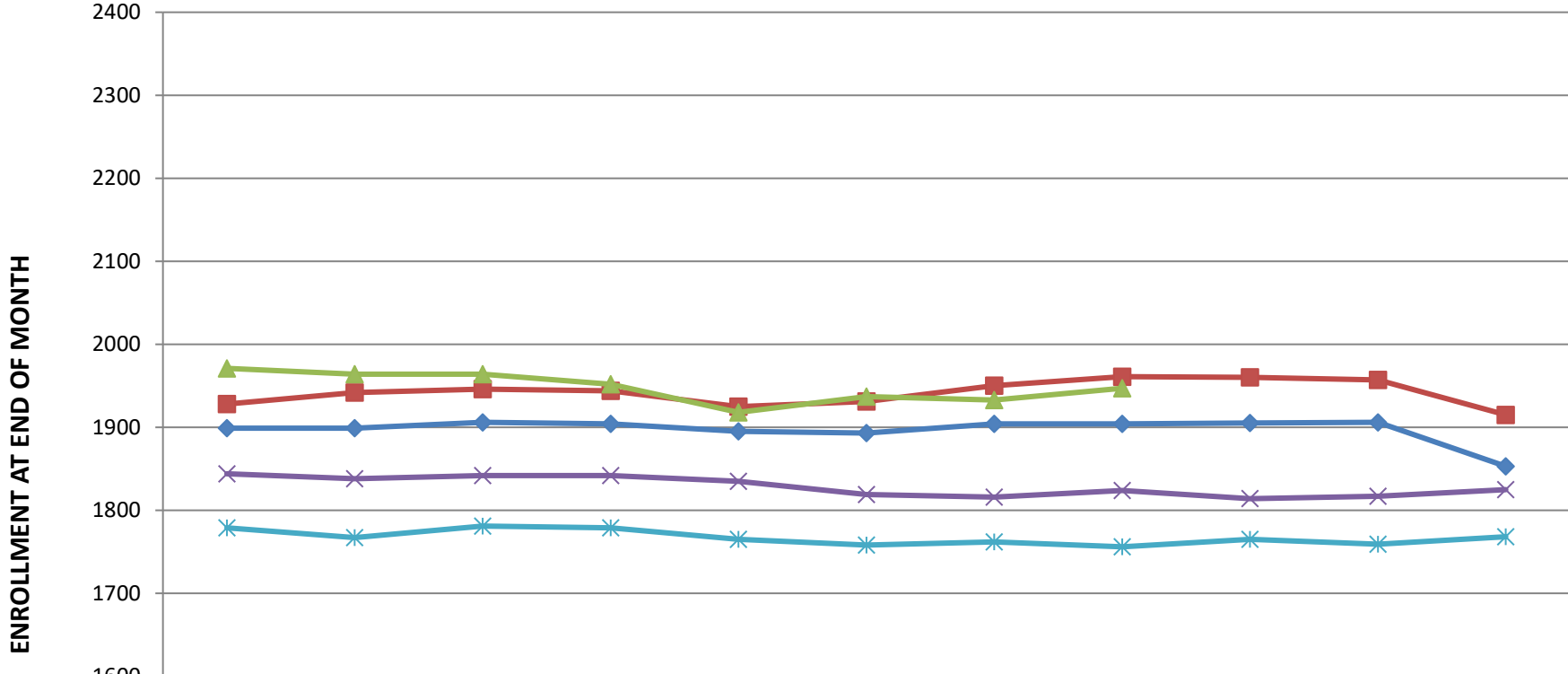
RECOMMENDATION:

That the Board receives the information presented

Time allocated: 3 minutes

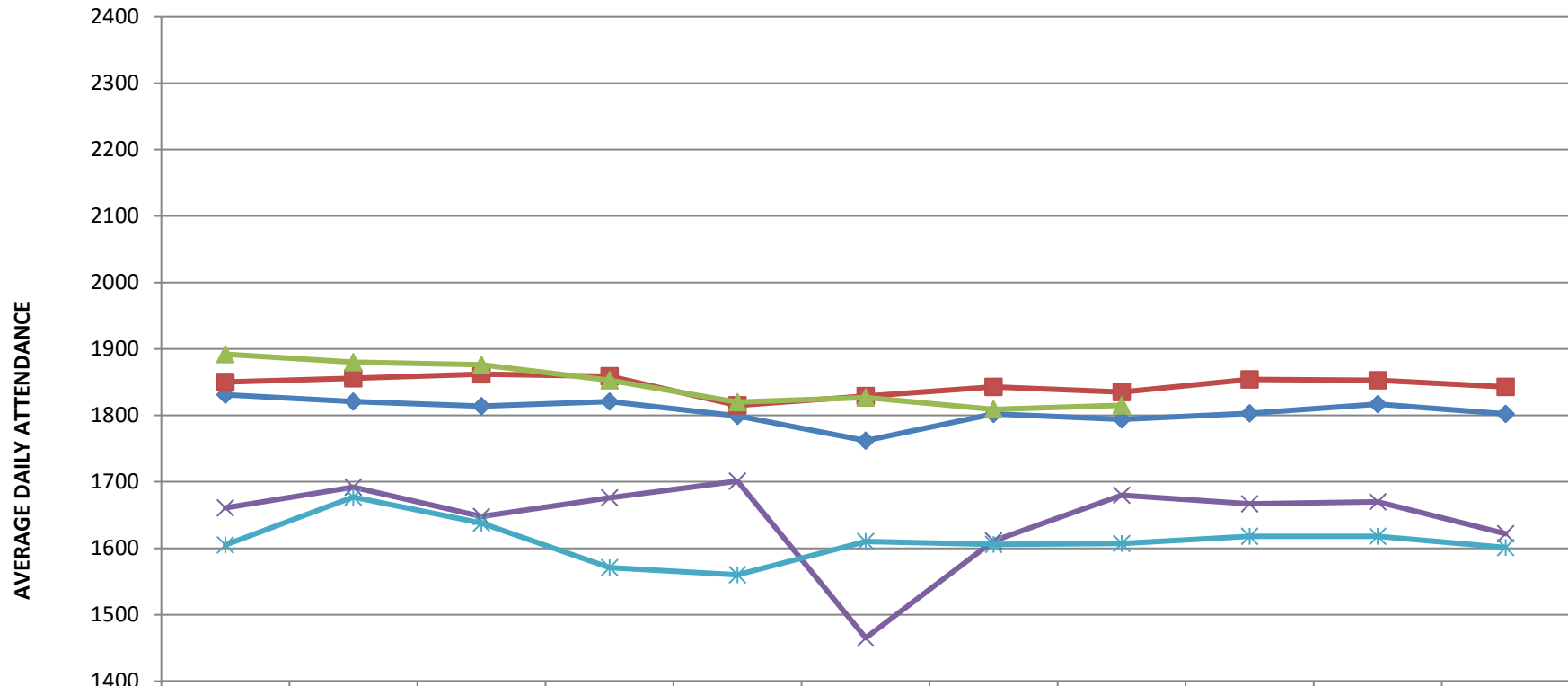
SITE		AUG	AUG	% of ADA		SEPT	SEPT	Incr/Decr	% of ADA	OCT	OCT	Incr/Decr	% of ADA	NOV	NOV	Incr/Decr	% of ADA
		22-23	23-24			22-23	23-24	From Pr Month		22-23	23-24	From Pr Month		22-23	23-24	From Pr Month	
BATES	ENR	83	80	96.3%		83	79	-1	97.5%	83	79	0	96.2%	82	78	-1	96.2%
	ADA	78	77			79	77			79	76			76	75		
CLARKSBURG (7th & 8th Gr)	ENR	138	118	93.2%		137	119	1	93.3%	136	117	-2	94.9%	138	116	-1	94.8%
	ADA	123	110			129	111			130	111			119	110		
ISLETON	ENR	174	167	97.6%		178	181	14	91.7%	176	178	-3	95.5%	177	172	-6	97.1%
	ADA	161	163			166	166			165	170			161	167		
RIVERVIEW	ENR	168	158	93.0%		165	163	5	92.6%	165	158	-5	94.3%	164	159	1	94.3%
	ADA	152	147			152	151			151	149			150	150		
WALNUT GROVE	ENR	156	141	95.0%		136	142	1	90.8%	153	141	-1	92.9%	153	141	0	92.2%
	ADA	138	134			144	129			144	131			134	130		
D.H. WHITE	ENR	394	421	92.9%		398	424	3	93.2%	403	429	5	90.9%	400	433	4	90.8%
	ADA	353	391			361	395			361	390			347	393		
ELEMENTARY SUB TOTAL	ENR	1,113	1,085			1,097	1,108	23		1,116	1,102	-6		1,114	1,099	-3	
	ADA	1,005	1,022			1,031	1,029			1,030	1,027			987	1,025		
CLARKSBURG (9th Grade)	ENR	62	67	95.5%		64	68	1	92.6%	63	68	0	94.1%	64	68	0	94.1%
	ADA	58	64			60	63			60	64			55	64		
DELTA HIGH	ENR	211	185	93.5%		206	183	-2	92.3%	204	183	0	93.4%	204	181	-2	93.4%
	ADA	185	173			193	169			192	171			183	169		
RIO VISTA HIGH	ENR	367	350	92.6%		367	349	-1	92.8%	365	346	-3	91.0%	362	341	-5	91.5%
	ADA	335	324			327	324			328	315			319	312		
HIGH SCHOOL SUB TOTAL	ENR	640	602			637	600	-2		632	597	-3		630	590	-7	
	ADA	578	561			580	556			580	550			557	545		
Mokelumne High (Continuation)	ENR	1	8			4	8	0		4	10	2		4	12	2	
	ADA	0	3			41	5			2	5			1	8		
River Delta High/Elem (Alternative)	ENR	25	15			29	26	11		29	26	0		31	32	6	
	ADA	22	14			25	21			26	11			26	12		
Community Day	ENR	0	2			0	2	0		0	2	0		0	3	1	
	ADA	0	1			0	2			0	2			0	2		
TOTAL K-12 LCFF Funded	ENR	1,779	1,712			1,767	1,744	32		1,781	1,737	-7		1,779	1,736	-1	
	ADA	1,605	1,601			1,677	1,613			1,638	1,595			1,571	1,592		91.7%
Wind River- Adult Ed	ENR	8	0			0	0	0		9	17	17		10	17	0	
TOTAL DISTRICT	ENR	1,787	1,712			1,767	1,744	32		1,790	1,754	10		1,789	1,753	-1	

ENROLLMENT



	1	2	3	4	5	6	7	8	9	10	11
◆ 17/18	1899	1899	1906	1904	1895	1893	1904	1904	1905	1906	1853
■ 18/19	1928	1942	1946	1944	1925	1931	1950	1961	1960	1957	1915
▲ 19/20	1971	1964	1964	1952	1918	1937	1933	1947			
× 21/22	1844	1838	1842	1842	1835	1819	1816	1824	1814	1817	1825
* 22/23	1779	1767	1781	1779	1765	1758	1762	1756	1765	1759	1768

ACTUAL ATTENDANCE



	1	2	3	4	5	6	7	8	9	10	11
◆ 17/18	1831	1821	1814	1821	1799	1762	1802	1794	1803	1817	1802
■ 18/19	1850	1856	1862	1859	1815	1829	1843	1835	1854	1853	1843
▲ 19/20	1892	1880	1876	1853	1820	1827	1809	1815			
× 21/22	1661	1692	1648	1676	1701	1465	1611	1680	1667	1670	1622
* 22/23	1605	1677	1638	1571	1560	1610	1606	1607	1618	1618	1601

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: x

From: Tammy Busch, Asst. Supt., Business

Item Number: 9.3.1.2

Type of item: (Action, Consent Action or Information Only): Information Only

SUBJECT:

Transportation update from the Supervisor of Transportation

BACKGROUND:

At the November 12, 2023 Board meeting, and after public comment from parents, the Board requested an update regarding transportation and current routes within the district.

STATUS:

Supervisor of Transportation will provide an update for the Board regarding the District's Transportation

PRESENTER:

Michael Mimiaga, Supervisor of Transportation

OTHER PEOPLE WHO MIGHT BE PRESENT:

COST AND FUNDING SOURCES:

Not applicable

RECOMMENDATION:

That the Board receives transportation update from Supervisor of Transportation.

Time allocated: 15 minutes

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 9457-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: X

From: Katherine Wright, Superintendent

Item Number: 10.1

Type of item: (Action, Consent Action or Information Only): Consent Action

SUBJECT:

Request to Approve the Minutes from the Regular meeting of the Board of Trustees held on November 14, 2023.

BACKGROUND:

Attached are the Minutes from the Regular meeting of the Board of Trustees held on November 14, 2023.

STATUS:

The Board is to review and approve.

PRESENTER:

Katherine Wright, Superintendent

OTHER PEOPLE WHO MIGHT BE PRESENT:

Jennifer Gaston, Recorder

COST AND FUNDING SOURCES:

None

RECOMMENDATION:

That the Board approves the Minutes as submitted.

Time allocated: 2 minutes

RIVER DELTA UNIFIED SCHOOL DISTRICT

MINUTES

REGULAR MEETING

November 14, 2023

1. **Call Open Session to Order** – Board President Lamera called the Open Session of the meeting of the Board of Trustees to order at 5:30 p.m. on November 14, 2023, at Clarksburg Middle School, Clarksburg, California.
2. **Roll Call of Members:**
 - Marcial Lamera, President
 - Jennifer Stone, Vice President (Absent)
 - Randall Jelly, Clerk
 - Marilyn Riley, Member (Absent)
 - Rafaela Casillas, Member (Arrived 5:40pm)
 - Wanda Apel, Member
 - Dan Mahoney, MemberAlso present: Katherine Wright, Superintendent
3. **Review, Approve the Closed Session Agenda**
 - 3.1 Board President Lamera announced items on the Closed Session Agenda
 - 3.2 Public Comment on Closed Session Agenda Items. – None to report
4. **Approve Closed Session and Adjourn to Closed Session**
 - 4.1 Board President Lamera asked for a motion to approve the Closed Session agenda and adjourned the meeting to **Closed Session @ 5:31 pm.**
Member Apel moved to approve, Member Jelly seconded. Motion carried 4 (Ayes: Jelly, Apel, Mahoney, Lamera): 0 (Nays): 3 (Absent: Stone, Riley, Casillas)
5. **Open Session was reconvened at 6:33 pm**
 - 5.1 Roll was retaken. Members Stone and Riley were absent. All the other members were present. Also present: Katherine Wright, Superintendent; Tammy Busch, Assistant Superintendent of Business Services; Nancy Vielhauer, Assistant Superintendent of Educational Services and Jennifer Gaston, Recorder
 - 5.2 Pledge of Allegiance was led by Craig Cornelson, Principal of Delta High and Clarksburg Middle Schools
6. **Report of Action taken, if any, during the Closed Session** (Government Code Section 54957.1)
Board President Lamera reported that the Board received information; no action taken during Closed Session.
7. **Review and Approve the Open Session Agenda**
 - 7.1 Board President Lamera asked for a motion to approve the Open Session agenda
Member Mahoney moved to approve, Member Jelly seconded. Motion carried 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)
8. **Public Comment:** Mr. Juan Bribiesca expressed his concerns of the cancelled transportation route on Ryer Island. He indicated that Ryer Island started the year without transportation services. They finally were receiving the services, only to have them taken away again. He stated that it was explained to him that the transportation route was cancelled because there were so few students on the route; that it was not a priority. Mr. Bribiesca mentioned that another parent spoke to a person in the transportation office. They were told by the supervisor, that he was only following orders given to him to cancel the route because the route was too small, it is not mandatory to provide transportation and that it is the parents' obligation to provide transportation for their children. Mr. Bribiesca has the opinion that families are being discriminated against because they are farm workers and transportation needs to be equal for everyone. He mentioned again that it is of his opinion that they are being discriminated against because they are Latino.
9. **Special Presentations, Reports, Information**
 - 9.1 Special Presentations
 - 9.1.1 Syserco Solar and Energy Update – Josh Sarpotdar, a Representative from Syserco Energy Solutions, Inc. (SES), explained that SES was hired to develop a districtwide, comprehensive energy service project plan. SES conducted an examination of existing systems, equipment and a detailed energy and operational audit of the District's facilities to determine the full

potential of savings. Syserco Energy Solutions provided a proposal which had three options to review. The proposals are a culmination of the audit findings, recommended measures to be taken, and the infrastructure enhancements to reduce overall cost. SES worked with District staff and other partners to obtain data on energy usage, ascertained detailed information for the analysis of existing equipment and systems. The proposals provided energy efficiency as well as enhancement projects. The goals of the projects are to reduce energy consumption across the District's infrastructure, reduce the ongoing utility and operational costs, reduce the overall greenhouse gas emissions, upgrade aging infrastructure by improving efficiencies of existing equipment and systems, and create safer and more comfortable conditions for the students and staff.

9.2 Board Member(s) and Superintendent Report(s) and/or Presentation(s) –

9.2.1 Board Members' report(s) Board President Lamera reported that on October 21st, the Board of Trustees had a Special Board meeting, a Board retreat of sorts. He mentioned that it was a great opportunity to learn more about the Brown Act and the Roles of a Board Member. During the meeting they discussed the indicators to look for to ensure the financial stability of the District. President Lamera mentioned that he and Member Apel made site visits to D.H White Elementary School, Riverview Middle School and Rio Vista High School. He thanked the principals for welcoming them to their campuses. Lastly, he reported that the past Saturday, the Clarksburg County Run took place and was well attended. He noted that the Isleton Tigers participated in the run. It was exciting to see so many people come and join the morning run.

Member Apel reported that during the site visits, they went to many classrooms and spoke with staff members and observed how the security system is being used. They talked about the upcoming Bond repairs at each site and the fencing projects that are in the works. She noted that, while at Riverview Middle School, they saw the photosynthesis science projects the students were working on. While at Rio Vista High School, they visited the woodshop and walked the school grounds. They spoke to many students about the atmosphere and culture on campus, the majority of the students only had positive things to say. While walking the campus at Rio Vista High School by the construction site, they were able to see the framing of the new Culinary Arts and Science building. Member Apel thanked the principals for accommodating their visits.

Member Mahoney reported that Rio Vista High School sponsored a career day. He mentioned that the 8th grade students from Riverview and the Junior and Senior classes of Rio Vista High School attended the event. He reported that the event was incredible and that the students were actively engaged. Member Mahoney stated that his son, Seann Mahoney, a Rio Vista High School graduate, was asked to participate. Many students visited his booth and asked questions of his field of work. There were many former students manning the booths representing their professions. Member Mahoney stated that it was great to see what these former students were doing in their careers. Immediately following the recent earthquake, Member Mahoney went to Riverview Middle School. He noticed that all the students were orderly in their lines and following instructions. He also visited D.H. White Elementary School where everything was under control after the earthquake. He noticed that a couple of students were under duress because they were worried about their younger siblings. Staff members took these students to see their siblings to ensure they were all doing okay. Rio Vista High School was back to normal and seemed to be unfazed. The following day after the earthquake, the scheduled annual earthquake drill took place.

Member Casillas reported that there were many things happening at Walnut Grove Elementary School. The school site worked with First 5 and the Consulado Mexicano (Mexican Consulate) to host a resource fair for farm working families, which was well attended. Current and former Walnut Grove Elementary School students participated in the ceremonies of La Escolta Mexicana (Independence Day in Mexico) taught by former Walnut Grove parents. The Annual Pumpkin Giveaway took place, giving all students from HeadStart through sixth grade a pumpkin to take home as well as receiving treats and cupcakes. The student's energy was very high at the second Student of the Month assembly. Wilson, the school's mascot, is a hit among the students. They are very excited to see him and take pictures with him. The school's PTA and First 5 worked collaboratively to host a Harvest Festival. She mentioned that it was nice to

see staff, parents and students in their costumes having fun. On Halloween, students wore their costumes and participated in a school wide parade. Staff members were dressed as different Barbies and Principal Perez was dressed as Ken. The First 5 employees were dressed as characters of Matilda. Each student received a cupcake to decorate and then eat. Walnut Grove Elementary and First 5 hosted a Trunk or Treat event, with staff and parents parked in the parking lot for students to visit and receive Halloween treats and dental goody bags. Families are looking forward to the event next year. Member Casillas mentioned that a volleyball tournament is being held on Thursday at Walnut Grove Elementary. They are very proud of the students. Her daughter is very excited to be participating in the tournament.

Superintendent Wright's report(s) - Superintendent Wright welcomed the guests and wished them a Happy early Thanksgiving. She stated that she is thankful for a successful first quarter and a half and looking forward to the break in the upcoming week. She extended her best wishes for a safe, happy and love-filled week. With this being said, she mentioned that the holidays can be a stressful and emotional time of year for many and invited everyone to reach out to friends and loved ones to check on them and make sure they are doing okay. Superintendent Wright announced that the District offers a service to all students, their families and staff members through Care Solace, that provides mental and emotional support, stating that they can reach out to the school's principals or the district office if they know of someone who could benefit from this service.

Superintendent Wright reported that she attended the City of Rio Vista's Council meeting to support their efforts to appoint Youth Commissioners to their four commissions. She congratulated Forest Drury, Sherley Guerra, Luke Fortes, and Naj Asad of Rio Vista High School for being the newly appointed Youth Commissioners. She stated that, at the same Council meeting, the Council approved the Joint Use Agreement between the City and River Delta Unified School District, which will be presented for the Board's approval later in the meeting. She noted that she is thankful for the improved communication and relationship that has been developed over the past four years with the City of Rio Vista. With so many challenging decisions in the near future, including California Forever's education plan, this relationship is increasingly important.

Superintendent Wright noted that for the past four years the District has been standing strong on the concept that construction of a new school is needed to service the students of Liberty and Brann Ranch neighborhoods in Rio Vista. However, she is gravely concerned of the developers response to the request. She realizes that without their cooperation and contribution, our children will not receive their neighborhood school. With the Agreement expiring in January, the District is asking families and community members to join in respectfully voicing their support for the new neighborhood school to be built by strongly encouraging the developers to provide the necessary funding contribution.

In closing, Superintendent Wright expressed her gratitude for all the community members for making the critical improvements to our facilities possible and to the Board for everything that has been done to keep the progress moving forward on the District's projects. She listed the projects that have been completed or being worked on at each school site.

9.3 Business Services' Reports and/or Presentations on: Routine Restricted Maintenance; Deferred Maintenance; Maintenance and Operations; Transportation Department; Food Services Department; District Technology; and District Budget – Tammy Busch, Asst. Superintendent of Business Services; Ken Gaston, Directors of MOT

9.3.1 Business Services' Report – Tammy Busch, Asst. Superintendent of Business Services

9.3.1.1 ADA/Enrollment Report – Tammy Busch, Asst. Superintendent of Business Services, reported that the Districtwide enrollment has decreased by 44 student compared to the same month in the 2022-2023 school year, with a decrease of seven compared to last month. The Districtwide ADA compared to the same month in 2022-2023 is 43, while a decrease of 18 compared to last month.

9.3.1.2 Monthly Financial Report – Tammy Busch, Asst. Superintendent of Business Services, provided a financial report showing the monthly cash flow in graph form.

9.3.1.3 Annual Developer Fee Report Presentation – Tammy Busch, Asst. Superintendent of Business Services, noted that annually within 180 days of the close of the fiscal year, local agencies that collect developer fees are required to provide a report to the public and the Board the accounting of funds that have been received or expensed.

9.3.1.4 Deferred Maintenance Plan – Tammy Busch, Asst. Superintendent of Business Services, noted that during the process of recouping funds due to damage during the storms of last winter through FEMA the Deferred Maintenance Plan had to be revised and updated as it had not been done in a few years. Ms. Busch noted that a plan for the Transportation Department had been added to the plan to account for preventative maintenance on all vehicles and buses.

9.4 Education Services' Reports and/or Presentation(s) - Nancy Vielhauer, Asst. Superintendent of Educational Services and Tracy Barbieri, Director of Special Education

9.4.1 Educational Services Update – Nancy Vielhauer, Asst. Superintendent of Educational Services, referred this time to the following presentation.

9.4.2 California Assessment of Student Performance and Progress (CAASPP) Data Information and Presentation - Nancy Vielhauer, Asst. Superintendent of Educational Services provided a presentation to the Board of Trustees explaining the informational data and where the district stands comparatively to the last few years. She also provided the District's change in progress compared to other districts of similar size and the states progress level. Ms. Vielhauer noted that, although some levels of progress had increased from the previous year, the majority of progress levels decreased. She stated that the District's Leadership meetings have been focused on what strategies have been or will be implemented to address raising the level of progress to meet or exceed the standards. The Assistant Superintendent of Educational Services, Nancy Vielhauer, and other partners have revised the tools used for assessing Academic Conversations in the classroom. President Lamera asked the Principals to give three strategies they plan to use to increase the test scores for this school year. The Principals indicated that during their leadership meetings they have been working diligently on the practices using the newly revised Academic Conversation tools, as well as, provided their other strategies they have started implementing or will be implementing to increase the scores at their school site.

9.5 River Delta Unified Teacher's Association (RDUTA) Update – Chris Smith, RDUTA President, no report given.

9.6 California State Employees Association (CSEA) Chapter 319 Update – Patty DuBois, CSEA President, a written report was forwarded to the Board of Trustees.

10. **Consent Calendar**

10.1 Approve Board Minutes

Regular Meeting of the Board, October 10, 2023

Special Meeting of the Board, October 21, 2023

10.2 Receive and Approve Monthly Personnel Reports

As of November 14, 2023

10.3 District's Monthly Expenditure Report

October 2023

10.4 Request for Melody Greco, Riverview's Leadership Teacher, to Attend the California Association of Directors of Activities (CADA) Annual State Convention in Reno, NV on March 6-9, 2024 – Marcy Rossi, Principal

10.5 Request to Approve the Addition Funding to the General Agreement for Nonpublic, Nonsectarian School/Agency (Point Quest Central Valley) for the 2023-2024 School Year, the additional cost not to exceed \$100,000 Special Educational Funds – Tracy Barbieri, Director of Special Education

10.6 Request to Approve Request to Approve the Overnight Field Trip for Walnut Grove Elementary School 6th Grade Students to Attend the Sly Park Environmental Science Camp from May 13 through May 17, 2024 – Gabino Perez, Principal Walnut Grove Elementary

10.7 Request to Approve the Fundraising Events for D.H. White Elementary School, Proceeds to benefit the 6th Grade Science Camp Fieldtrip– Jennie Gornto, D.H White Elementary School Principal

- 10.8 Request to Approve for Services by Delta Tree Services to Provide Multiple Tree Trimming Services at Bates Elementary School and District Property in Courtland – Tammy Busch, Asst. Superintendent of Business Services
- 10.9 Request Approval for Pacific SouthWest to Replace the Irrigation Pump and VFD at D. H. White Elementary School at a cost of \$10,589.75, Maintenance and Operation Funds – Tammy Busch, Asst. Superintendent of Business Services
- 10.10 Donations or Receive and Acknowledge

Riverview Middle School

Lira’s Supermarket – Miscellaneous snacks approx. value \$80
 Debra Epner – Paper and Art Supplies

Isleton Elementary School – 6th Grade Sly Park Science Camp

Ramos Oil - \$510
 Manny’s Barzzeria - \$510
 Isleton Elementary School PTA - \$1,000
 Lira’s Supermarket - \$255
 F & M Bank – \$1,020
 Gornto Ditching - \$255

Isleton Elementary School

Anonymous - Pumpkins for all Students

D.H. White Elementary School – 6th Grade Sly Park Science Camp

Jim McPherson - \$255
 Anonymous - \$3,850
 Mayhood Ranches - \$1,020
 Patricia & Joseph Huyssoon - \$255
 Montezuma Fire Department - \$1,020
 Rotary International of Rio Vista - \$510

President Lamera acknowledged the donations and thanked them for their continued support.

Member Casillas moved to approve, Member Apel seconded. Motion carried 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)

Action Items -- Individual speakers who have submitted a Comment Card shall be allowed three minutes to address the Board on any agenda item. The Board shall limit the total time for public presentation and input on all items to a maximum of 20 minutes including the Public Comments made previously in this meeting. The Board will follow the process for Public Comments listed above.

- 11. Request to set and approve the scheduling of the Annual Organizational Meeting of the Board of Trustees of the River Delta Unified School District for Tuesday, December 12, 2023 with the Open Session beginning at 6:30 pm at the Rio Vista High School Theater – Katherine Wright, Superintendent

Member Jelly moved to approve, Member Mahoney seconded. Motion carried 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)

- 12. Request to Approve the First Reading of the Updated or New Board Policies, Administrative Regulation and or Exhibits Due to New Legislation or Mandated Language and Citation Revisions as of September 2023 and Special Revisions as of October 2023 – Katherine Wright, Superintendent

Member Apel moved to approve, Member Jelly seconded. Motion carried 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)

- 13. Request to Apply for the Three Year First 5 of Sacramento Renewal Grant Application in the Amount of \$465,000 to Fund the First 5 School Readiness Program – Gabino Perez, Principal

Member Casillas moved to approve, Member Apel seconded. Motion carried 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)

- 14. Request to Approve the Variable-Term Waiver as Authorized by the Commission on Teacher Credentialing for 2023-2024 School Year for Kimberly Anderson– Katherine Wright, Superintendent

Member Jelly moved to approve, Member Casillas seconded. Motion carried 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)

15. Request to Approve the Short-Term Staff Permit (STSP) as Authorized by the Commission on Teacher Credentialing for 2023-2024 School Year for Jeff Pearson and Emily Eustachy – Katherine Wright, Superintendent
Member Jelly moved to approve, Member Apel seconded. Motion carried 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)
16. Request to Amend and Restate the Joint Use Agreement Between the Sacramento Public Library Authority and the River Delta Unified School District Regarding the Use of District Property for the Courtland Library Operations and the Isleton Library Operations – Tammy Busch, Asst. Superintendent of Business Services
Member Apel moved to approve, Member Jelly seconded. Motion carried 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)
17. Request to Approve the Memorandum of Understanding Between California State Employees Association (CSEA) Chapter 319 and River Delta Unified School District Regarding Increase to the Article 16: Pay Allowances and Article 17: Health and Welfare Benefits Contribution in accordance with RDUSD Approval of the River Delta Unified Teachers Association (RDUTA) Tentative Agreement on October 10, 2023 – Katherine Wright, Superintendent
Member Casillas moved to approve, Member Mahoney seconded. Motion carried 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)
18. Request to Approve Resolution #856 to Pay Absent Board Member Marilyn Riley Due to Family Illness or Injury from the September 12, 2023, Regular Meeting of the Board of Trustees – Board President Lamera
Member Casillas moved to approve, Member Jelly seconded. Motion carried by roll call vote 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)
19. Request to Approve the Agreement with Cooperative Strategies to Provide a Commercial/Industrial and Residential Development School Fee Justification Study, cost not to exceed \$12,500 – Tammy Busch, Asst. Superintendent of Business Services
Member Apel moved to approve, Member Casillas seconded. Motion carried 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)
20. Request to Approve the Lease Agreement with Mobile Modular to Provide Temporary Interim Housing Portables for Riverview Middle School – cost not to exceed \$414,010, Measure J Bond Funds – Tammy Busch, Asst. Superintendent of Business Services
Member Casillas moved to approve, Member Mahoney seconded. Motion carried 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)
21. Request to Approve the Contract with F3 & Associates, Inc. to Provide Professional Land Surveying Services (Topographic Survey, Topographic Survey Map, Utility Locating) for the Riverview Middle School Temporary Interim Housing Portable Project - \$11,520, Measure J Bond Funds – Tammy Busch, Asst. Superintendent of Business Services
Member Apel moved to approve, Member Jelly seconded. Motion carried 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)
22. Request to Approve the Proposal from Wilson Architecture for Design Services for the Riverview Middle School Temporary Interim Housing Portable Project - \$54,700, Measure J Bond Funds – Tammy Busch, Asst. Superintendent of Business Services
Member Jelly moved to approve, Member Casillas seconded. Motion carried 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)
23. Request to Approve the Proposal from Wilson Architecture for Design Services through DSA Approval for the Fencing Projects at Rio Vista High School and Isleton Elementary School, \$24,200, Measure J Bond Funds – Tammy Busch, Asst. Superintendent of Business Services
Member Jelly moved to approve, Member Casillas seconded. Motion carried 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)

24. Request to Approve the Delta High School/Clarksburg Middle School Septic System Replacement Project - \$58,000 Deferred Maintenance Funds - Tammy Busch, Asst. Superintendent of Business Services
Member Mahoney moved to approve, Member Apel seconded. Motion carried 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)
25. Request to Award a Contract to S&S Fencing Company for the Bates Elementary School Fencing Project – cost not to exceed \$24,990 Measure K Bond Funds – Tammy Busch, Asst. Superintendent of Business Services
Member Casillas moved to approve, Member Jelly seconded. Motion carried 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)
26. Request to Approve Needed Repairs at the District Office, Including Roof, Exterior Stairs, Ceiling Tiles, Interior Painting and the Replacement of Two Windows - \$51,000 Routine Restricted Deferred Maintenance Funds - Tammy Busch, Asst. Superintendent of Business Services
Member Apel moved to approve, Member Jelly seconded. Motion carried 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)
27. Request to Approve Needed Repairs at the Rio Vista High School Woodshop, Including Leaking Skylights, Electrical and Dust Collection Systems - \$35,842 Measure J Bond Funds - Tammy Busch, Asst. Superintendent of Business Services
Member Apel moved to approve, Member Casillas seconded. Motion carried 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)
28. Request to Approve the Joint Use Agreement Between the City of Rio Vista and River Delta Unified School District Related to Use of City and District Facilities – Katherine Wright, Superintendent
Member Casillas moved to approve, Member Apel seconded. Motion carried 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)
29. Request for Future Board Agenda Items from Board Members – Board President Lamera asked the Board of Trustees for input on adding items to future Board agendas. After discussion, adding an action item to give direction on the Syserco Proposal, a transportation update, and information on J-1 Visa sponsorships for the District.
Member Casillas moved to approve, Member Jelly seconded. Motion carried 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)
30. Re-Adjourn to continue Closed Session, if needed – Board President Lamera reported that the Board would not reconvene to Closed Session.
31. Report of Action taken, if any, during continued Closed Session (Government Code Section 54957.1) –Board President Lamera reported that the Board had not reconvened to Closed Session and have nothing to report.
32. Adjournment: There being no further business before the Board, Board President Lamera asked for a motion to adjourn.
Member Casillas moved to approve, Member Jelly seconded. Motion carried 5 (Ayes: Jelly, Apel, Casillas, Mahoney, Lamera): 0 (Nays): 2 (Absent: Stone, Riley)

The meeting was adjourned at 9:34 pm

Submitted:

Approved:

Katherine Wright, Superintendent and
Secretary to the Board of Trustees

Randall Jelly, Clerk, Board of Trustees

By: Jennifer Gaston, Recorder
End

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 9457-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: X

From: Codi Agan, Director of Personnel

Item Number: 10.2

Type of item: (Action, Consent Action or Information Only): Consent Action

SUBJECT:

Request to Approve the Monthly Personnel Transaction Report

BACKGROUND:

STATUS:

PRESENTER:

Katherine Wright, Superintendent

OTHER PEOPLE WHO MIGHT BE PRESENT:

Staff

COST AND FUNDING SOURCES:

RECOMMENDATION:

That the Board approves the Monthly Personnel Transaction Report as submitted

Time allocated: 2 minutes

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: X

From: Tammy Busch, Asst. Superintendent of Business Services Item Number: 10.3

Type of item: (Action, Consent Action or Information Only): Consent

SUBJECT:

Approve Monthly Expenditure Summary

BACKGROUND:

The Staff prepares a report of expenditures for the preceding month.

STATUS:

PRESENTER:

Tammy Busch, Asst. Superintendent of Business Services

OTHER PEOPLE WHO MIGHT BE PRESENT:

COST AND FUNDING SOURCES:

Not Applicable

RECOMMENDATION:

That the Board approves the monthly expenditure summary report as submitted.

Time allocated: 2 minutes

Batch status: A All

From batch: 0095

To batch: 0098

Include Revolving Cash: Y

Include Address: N

Include Object Desc: N

Include Vendor TIN: Y

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef		
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount	

015821/00	APB ELECTRIC									
240136	PO-240129	11/01/2023	INV#101223	SMRTBRD	INSTALL	1	01-3213-0-5800-000-1110-1000-000-224	NN F	1,189.38	1,189.38
					TOTAL PAYMENT AMOUNT				1,189.38 *	1,189.38
015430/00	Amazon Capital Services	820544687								
240050	PO-240029	11/01/2023	INV#193V-NXKM-KT36	MAINT		1	01-8150-0-4300-000-0000-8110-000-000	NN P	1,226.72	1,226.72
240106	PO-240083	11/01/2023	INV#1LC3-WVTP-HTXK	WGE		2	01-0000-0-4300-000-1110-1000-000-214	NN P	6,062.24	6,062.24
240220	PO-240200	11/01/2023	INV#1YRJ-PRKH-3CFJ	RMS		1	01-1100-0-4300-000-1110-1000-000-222	NN F	134.12	122.08
240220	PO-240200	11/01/2023	INV#1YRJ-PRKH-3CJF	RMS		2	01-0740-0-4300-000-1110-1000-000-222	NN F	89.46	81.40
240230	PO-240208	11/01/2023	INV#1NJL-FTNM-XGVN	RMS		1	01-0000-0-4300-000-1110-1000-000-222	NN F	229.61	230.15
240264	PO-240238	11/01/2023	INV#1MLP-X3X6-117G	RMS		1	01-0000-0-4300-000-1110-1000-000-222	NN F	70.59	71.54
240289	PO-240257	11/01/2023	INV#1RNV-MMJT-WTVF	RMS		1	01-1100-0-4300-000-1110-1000-000-222	NN F	28.80	28.80
240324	PO-240295	11/01/2023	INV#1G6C-YNFT-4L39	RMS		1	01-0000-0-4300-000-1110-1000-001-222	NN F	379.67	344.44
240332	PO-240303	11/02/2023	INV#1NHK-QC1P-4MTD	RMS		1	01-1100-0-4300-000-1110-1000-000-222	NN F	11.77	12.70
240332	PO-240303	11/02/2023	INV#1NHK-QC1P-4MTD	RMS		2	01-0740-0-4300-000-1110-1000-000-222	NN F	7.84	8.47
					TOTAL PAYMENT AMOUNT				8,188.54 *	8,188.54
015654/00	CAPITAL KIDS OCCUPATIONAL									
240164	PO-240148	11/01/2023	INV#CK23028	OCT	SRVCS	1	01-6500-0-5800-000-5770-1190-000-000	NN P	5,370.00	5,370.00
					TOTAL PAYMENT AMOUNT				5,370.00 *	5,370.00
015844/00	CUMMING GROUP									
240259	PO-240233	11/01/2023	INV#134032	PROF	SRVCS	1	01-0000-0-5800-000-9200-7360-000-000	NN P	3,995.00	3,995.00
					TOTAL PAYMENT AMOUNT				3,995.00 *	3,995.00
010469/00	E.F. KLUDT & SONS INC	942369157								
240080	PO-240060	11/01/2023	INV#311282	FUEL		1	01-0720-0-4340-000-0000-3600-000-000	NN P	1,949.32	1,949.32
					TOTAL PAYMENT AMOUNT				1,949.32 *	1,949.32
013913/00	FLORAL FRESH	680095675								
240208	PO-240184	11/01/2023	INV#1349520	FLORAL	SUPPL	3	01-0000-0-4300-000-1215-1000-800-311	NN P	350.18	350.18
240208	PO-240184	11/01/2023	INV#1349520	FLORAL	SUPPL	4	01-7010-0-4300-000-1215-1000-800-311	NN P	350.17	350.17
					TOTAL PAYMENT AMOUNT				700.35 *	700.35

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn Op1 Op2 T9MPS	Liq Amt	Net	Amount
013912/00	FLORAL RESOURCES SACRAMENTO	455530476						
240209 PO-240185	11/01/2023	INV#1349519 FLORAL SUPPL	3	01-0000-0-4300-000-1215-1000-800-311	N7 P	194.12	194.12	
240209 PO-240185	11/01/2023	INV#1349519 FLORAL SUPPL	4	01-7010-0-4300-000-1215-1000-800-311	N7 P	194.12	194.12	
		TOTAL PAYMENT AMOUNT			388.24 *		388.24	
003598/00	GRAINGER	361150280						
240035 PO-240019	11/01/2023	INV#9858437131 MAINT SUPPL	1	01-8150-0-4300-000-0000-8110-000-000	NN P	254.92	254.92	
240035 PO-240019	11/01/2023	INV#9859809957 MAINT SUPPL	1	01-8150-0-4300-000-0000-8110-000-000	NN P	249.80	249.80	
		TOTAL PAYMENT AMOUNT			504.72 *		504.72	
014824/00	J & D WHOLESALE	000000000						
240285 PO-240263	11/01/2023	INV#06305177 FLORAL SUPPL	1	01-0000-0-4300-000-1215-1000-800-321	NN P	61.38	61.38	
240285 PO-240263	11/01/2023	INV#06305177 FLORAL SUPPL	2	01-7010-0-4300-000-1215-1000-800-321	NN P	61.37	61.37	
		TOTAL PAYMENT AMOUNT			122.75 *		122.75	
015838/00	MASTERLIBRARY.COM LLC	454605869						
240261 PO-240227	11/01/2023	INV#22-1300 FAC USE SOFTWARE	1	01-0840-0-5882-000-0000-8200-000-000	NN F	2,500.00	2,500.00	
		TOTAL PAYMENT AMOUNT			2,500.00 *		2,500.00	
015075/00	NO RED INK	383893997						
240089 PO-240075	11/01/2023	INV#22310 STUDENT LICENSING	1	01-0000-0-5882-222-1110-1000-000-000	NN P	3,400.00	3,400.00	
		TOTAL PAYMENT AMOUNT			3,400.00 *		3,400.00	
014333/00	PROCARE THERAPY	261251927						
240296 PO-240269	11/01/2023	INV#20786536 PARAPROFESS.	1	01-6500-0-5100-000-5750-1190-000-000	NN P	1,564.20	1,564.20	
240296 PO-240269	11/01/2023	INV#20781214 PARAPROFESS.	1	01-6500-0-5100-000-5750-1190-000-000	NN P	1,920.00	1,920.00	
240296 PO-240269	11/01/2023	INV#20792710 PARAPROFESS.	1	01-6500-0-5100-000-5750-1190-000-000	NN P	2,400.00	2,400.00	
		TOTAL PAYMENT AMOUNT			5,884.20 *		5,884.20	
014859/00	RIO VISTA BAKERY & CAFE							
240184 PO-240171	11/02/2023	REC#95969 RVHS METAL HEALTH	1	01-0000-0-4300-000-1110-1000-000-321	NN P	86.25	86.25	
		TOTAL PAYMENT AMOUNT			86.25 *		86.25	

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount

015863/00	SCHOOL SERVICES OF CALIFORNIA								
240338 PO-240307	11/01/2023	CODI AGAN WEBINAR	1	01-0000-0-5200-000-0000-7400-000-000	NN F			195.00	195.00
240338 PO-240307	11/01/2023	VICKI PRECIADO WEBINAR	2	01-0000-0-5200-000-0000-7300-000-000	NN F			195.00	195.00
		TOTAL PAYMENT AMOUNT		390.00 *					390.00
013540/00	SOLIANT HEALTH	000000000							
240270 PO-240243	11/01/2023	INV#20787672 BCBA	1	01-6500-0-5800-000-5770-1190-000-000	NN P			14,724.45	14,724.45
240270 PO-240243	11/01/2023	INV#20782344 BCBA	1	01-6500-0-5800-000-5770-1190-000-000	NN P			16,898.11	16,898.11
240270 PO-240243	11/01/2023	INV#20793591 BCBA	1	01-6500-0-5800-000-5770-1190-000-000	NN P			16,840.50	16,840.50
		TOTAL PAYMENT AMOUNT		48,463.06 *					48,463.06
014069/00	STAPLES ADVANTAGE	043390816							
240142 PO-240124	11/01/2023	INV#3549444486 RMS SUPPL	1	01-0000-0-4300-000-1110-1000-000-222	NN P			26.41	26.41
240142 PO-240124	11/01/2023	INV#3549444486 RMS SUPPL	2	01-0740-0-4300-000-1110-1000-000-222	NN P			17.60	17.60
240193 PO-240160	11/01/2023	INV#354806889 BATES SUPPL	1	01-0000-0-4300-000-1110-1000-000-213	NN P			120.88	120.88
		TOTAL PAYMENT AMOUNT		164.89 *					164.89
015115/00	SWANK MOVIE LICENSING USA								
240313 PO-240285	11/02/2023	DHW LICENSSE FEES	1	01-1100-0-5800-000-1110-1000-000-223	NN F			550.00	550.00
		TOTAL PAYMENT AMOUNT		550.00 *					550.00
015854/00	THE GENESIS GROUP	834326065							
240345 PO-240315	11/01/2023	INV#23289015 OCT	1	01-6500-0-5800-000-5770-1190-000-000	NN P			2,920.00	2,920.00
240345 PO-240315	11/01/2023	INV#23261016 OCT	1	01-6500-0-5800-000-5770-1190-000-000	NN P			2,445.50	2,445.50
240345 PO-240315	11/01/2023	INV#23268017 OCT	1	01-6500-0-5800-000-5770-1190-000-000	NN P			2,920.00	2,920.00
240345 PO-240315	11/02/2023	INV#23275016 OCT	1	01-6500-0-5800-000-5770-1190-000-000	NN P			2,920.00	2,920.00
		TOTAL PAYMENT AMOUNT		11,205.50 *					11,205.50
015855/00	ZONAR SYSTEMS INC	260499050							
240305 PO-240278	11/02/2023	INV\$608110 VAN GPS SYSTEM	1	01-0720-0-5800-000-0000-3600-000-000	NN P			4,142.40	4,142.40
		TOTAL PAYMENT AMOUNT		4,142.40 *					4,142.40
		TOTAL Fund	PAYMENT	99,194.60 **					99,194.60

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount

015816/00	SR BRAY LLC								
240070	PO-240051	11/01/2023	INV#300584P0923	DHS	TEMP KITCH	1	23-9360-0-5800-000-9115-8500-030-000	NN F	0.00 250.00
					TOTAL PAYMENT AMOUNT				250.00 *
					TOTAL Fund	PAYMENT			250.00 **
					TOTAL BATCH PAYMENT		99,444.60 ***	0.00	99,444.60

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn Op1 Op2 T9MPS	Liq Amt	Net	Amount
015430/00	Amazon Capital Services	820544687						
PV-240412	11/02/2023	inv#1w9p-9kjd-lfjl	tchr	pthwy	01-0000-0-4400-107-1110-1000-826-000	NN		3,914.12
PV-240412	11/02/2023	inv#1w9p-9kjd-lfjl	tchr	pthwy	01-0000-0-4300-107-1110-1000-826-000	NN		867.66
PV-240412	11/02/2023	inv#1vhc-pydg-119c			01-8150-0-4300-000-0000-8110-000-000	NN		797.35
PV-240412	11/02/2023	inv#1vhc-pydg-119c			01-0000-0-4300-000-0000-8100-000-000	NN		415.81
PV-240412	11/02/2023	inv#1vhc-pydg-119c			01-8150-0-4400-000-0000-8110-000-000	NN		664.97
			TOTAL PAYMENT AMOUNT		6,659.91 *			6,659.91
012785/00	CAMFEL PRODUCTIONS	952760042						
PV-240404	11/02/2023	RMS STREAMING LESSONS			01-0000-1-4300-000-1110-1000-001-222	NN		1,432.80
			TOTAL PAYMENT AMOUNT		1,432.80 *			1,432.80
013722/00	DE LAGE LANDEN PUBLIC FINANCE	721603479						
PV-240405	11/02/2023	81228318	WGE		01-0000-0-5840-214-1110-1000-000-000	NN		175.37
PV-240405	11/02/2023	81207754	DIST OFF		01-0000-0-5840-000-0000-7200-000-000	NN		469.89
PV-240405	11/02/2023	81221339	DIST OFF		01-0000-0-5840-000-0000-7200-000-000	NN		834.41
PV-240405	11/02/2023	81228339	F5		01-9328-0-5840-000-0001-3900-000-524	NN		84.87
			TOTAL PAYMENT AMOUNT		1,564.54 *			1,564.54
011606/00	FOUNDATION FOR EDUCATIONAL							
PV-240414	11/02/2023	STALE DATE#23404329			01-0000-0-8699-000-0000-0000-000-000	NN		1,866.39
			TOTAL PAYMENT AMOUNT		1,866.39 *			1,866.39
015764/00	HAWKS AND HOUNDS INC.							
PV-240415	11/02/2023	STALE DATE#23405714			01-0000-0-8699-000-0000-0000-000-000	NN		723.00
			TOTAL PAYMENT AMOUNT		723.00 *			723.00
013807/00	HUBERT COMPANY LLC	311599078						
PV-240420	11/02/2023	MISSING AMOUNT FROM INVOICE			01-7032-0-4300-000-0000-3700-000-000	NN		7.70
PV-240420	11/02/2023	MISSING AMOUNT FROM INVOICE			01-7032-0-5800-000-0000-3700-000-000	NN		6.99
			TOTAL PAYMENT AMOUNT		14.69 *			14.69

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn Op1 Op2 T9MPS	Liq Amt	Net	Amount
013940/01	KELLY-MOORE PAINT CO INC	943310617						
	PV-240406	11/02/2023	31600000478530	PAINT	01-8150-0-4300-000-0000-8110-000-000	NN		425.40
				TOTAL PAYMENT AMOUNT		425.40 *		425.40
015512/00	LEAF	274256501						
	PV-240407	11/02/2023	INV#15486682	RVHS	01-0000-0-5840-321-1110-1000-000-000	NY		1,307.87
				TOTAL PAYMENT AMOUNT		1,307.87 *		1,307.87
015147/00	MICHAEL'S TRANSPORTATION SERV							
	PV-240408	11/02/2023	INV#122385	SPED DRIVING STAFF	01-6500-0-5800-000-0000-3600-000-000	NN		2,725.00
				TOTAL PAYMENT AMOUNT		2,725.00 *		2,725.00
003270/00	PG&E	940742640						
	PV-240409	11/02/2023	OCT RADIO RIO		01-0000-0-5515-000-0000-8100-000-000	NN		28.22
				TOTAL PAYMENT AMOUNT		28.22 *		28.22
014333/00	PROCARE THERAPY	261251927						
	PV-240413	11/02/2023	STALE DATE#23401349		01-0000-0-8699-000-0000-0000-000-000	NN		9,195.88
				TOTAL PAYMENT AMOUNT		9,195.88 *		9,195.88
012529/00	RGM KRAMER	842164123						
	PV-240416	11/02/2023	STALE DATE# 2305717		01-0000-0-8699-000-0000-0000-000-000	NN		5,616.61
				TOTAL PAYMENT AMOUNT		5,616.61 *		5,616.61
010468/00	SACRAMENTO METROPOLITAN	680382186						
	PV-240411	11/02/2023	INV#2324-10-00873	PERMIT RENEW	01-0720-0-5800-000-0000-3600-000-000	NN		1,380.00
				TOTAL PAYMENT AMOUNT		1,380.00 *		1,380.00
013997/00	VERIZON WIRELESS	223723921						
	PV-240419	11/02/2023	OCT PHONES		01-0000-0-5910-000-0000-7200-000-000	N7		17.43
	PV-240419	11/02/2023	OCT PHONES		01-0000-0-5910-000-0000-7200-000-000	N7		19.12
				TOTAL PAYMENT AMOUNT		36.55 *		36.55

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
014450/00	WIZIX	822534390							
PV-240410	11/02/2023	362898 RMS			01-0000-0-5840-222-1110-1000-000-000	NN			593.28
PV-240410	11/02/2023	365094 BATES			01-0000-0-5840-213-1110-1000-000-000	NN			70.12
PV-240410	11/02/2023	364535 DIST OFF			01-0000-0-5840-000-0000-7200-000-000	NN			369.31
PV-240410	11/02/2023	364533 DIST OFF			01-0000-0-5840-000-0000-7200-000-000	NN			237.50
PV-240410	11/02/2023	364533 ISLE			01-0000-0-5840-224-1110-1000-000-000	NN			656.67
TOTAL PAYMENT AMOUNT									1,926.88 *
TOTAL Fund PAYMENT									34,903.74 **

BATCH: 0096 PAY VOUCHERS

<< Open >>

Fund : 12 CHILD DEVELOPMENT FUND

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
015430/00	Amazon Capital Services	820544687							
PV-240412	11/02/2023	inv#ldyf-mclc-lvjg isle pre		12-6105-0-4300-000-0001-1000-891-000	NN				837.74
		TOTAL PAYMENT AMOUNT							837.74
		TOTAL Fund	PAYMENT						837.74

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
015430/00	Amazon Capital Services	820544687							
PV-240412	11/02/2023	inv#lfqt-tlgc-njmd cafe		13-5310-0-4300-000-0000-3700-000-000	NN				38.38
		TOTAL PAYMENT AMOUNT							38.38
		TOTAL Fund	PAYMENT						38.38
		TOTAL BATCH PAYMENT							35,779.86

BATCH: 0097 BOND

<< Open >>

Fund : 23 SFID#2 North

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn Op1 Op2 T9MPS	Liq Amt	Net Amount	
015812/00	BOBO CONSTRUCTION INC	941436622						
	PO-230661	11/02/2023	SEPT 23	DHS CAFE	1 23-9360-0-6270-000-9115-8500-030-000	NN P	261,913.64	261,913.64
				TOTAL PAYMENT AMOUNT			261,913.64 *	261,913.64
015797/00	CHRISTOPHER WARD GULLP	552067982						
	PO-230642	11/02/2023	INV#23-1002-03	CMS/DHS CAFE	1 23-9360-0-6263-000-9115-8500-030-000	NN P	6,760.00	6,760.00
				TOTAL PAYMENT AMOUNT			6,760.00 *	6,760.00
015210/00	HKIT							
	PO-230001	11/02/2023	INV#14	DHS/CMS CAFE	1 23-9360-0-6215-000-9115-8500-030-000	NN P	9,449.64	9,449.64
				TOTAL PAYMENT AMOUNT			9,449.64 *	9,449.64
				TOTAL Fund	PAYMENT		278,123.28 **	278,123.28
				TOTAL BATCH PAYMENT			917,626.66 ***	917,626.66
						0.00		

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount

012796/00	ROSSI, MARCY								
PV-240418	11/02/2023	REIMBURSEMENTS			01-0000-0-4300-000-1110-1000-000-222	NN			234.63
PV-240418	11/02/2023	REIMBURSEMENTS			01-0000-0-4300-000-1110-1000-000-222	NN			63.99
TOTAL PAYMENT AMOUNT					298.62	*			298.62
TOTAL Fund					PAYMENT	298.62	**		298.62

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
015787/00	RIVERA, LAURA								
PV-240417	11/02/2023	OCT MILEAGE			13-5310-0-5230-000-0000-3700-000-000	NN			172.72
					TOTAL PAYMENT AMOUNT				172.72
									172.72
					TOTAL Fund	PAYMENT			172.72
									**
					TOTAL BATCH PAYMENT				471.34

					TOTAL DISTRICT PAYMENT				1,053,322.46

					TOTAL FOR ALL DISTRICTS:				1,053,322.46

					Number of checks to be printed:	45, not counting voids due to stub overflows.			1,053,322.46

Batch status: A All

From batch: 0099

To batch: 0104

Include Revolving Cash: Y

Include Address: N

Include Object Desc: N

Include Vendor TIN: Y

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
015023/00	49ER WATER SERVICES	813849564							
240030	PO-240038	11/07/2023	INV#5480	SRVCS FOR UP RIVER	1	01-8150-0-5800-000-0000-8110-000-000	NN P	500.00	500.00
				TOTAL PAYMENT AMOUNT				500.00 *	500.00
				TOTAL Fund				PAYMENT	500.00 **
				TOTAL BATCH PAYMENT				500.00 ***	0.00
									500.00

BATCH: 0100 BOND

<< Open >>

Fund : 22 SFID#1 South

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn Op1 Op2	T9MPS	Liq Amt	Net Amount	
015021/00	KEREX ENGINEERING INC.	475083300							
PO-230459	11/07/2023	DHW PROJ APP #5	1	22-9359-0-6175-000-9115-8500-050-000	NN P		19,146.45	19,146.45	
		TOTAL PAYMENT AMOUNT					19,146.45 *	19,146.45	
012529/00	RGM KRAMER	842164123							
PO-230004	11/07/2023	INV#133922 RVHS CULIN/SCI	1	22-9359-0-6272-000-9115-8500-025-000	NN P		11,537.50	11,537.50	
PO-230084	11/07/2023	INV#133932 MEAS J ROOFING	1	22-9359-0-6272-000-9115-8500-010-000	NN P		1,342.77	1,342.77	
PO-230528	11/07/2023	INV#133919 RMS CLASSROOM	1	22-9359-0-6272-000-9115-8500-070-000	NN P		10,163.40	10,163.40	
PO-230595	11/07/2023	INV#133920 RVHS GYM MODERN	1	22-9359-0-6272-000-9115-8500-085-000	NN P		6,693.75	6,693.75	
240069	PO-240050	11/07/2023	INV#133430	DHW ADMIN BUIDLING	1	22-9359-0-6272-000-9115-8500-080-000	NN P	3,562.50	3,562.50
240075	PO-240053	11/07/2023	INV#133431	ISLE ADMIN BUILDING	1	22-9359-0-6272-000-9115-8500-082-000	NN P	4,875.00	4,875.00
		TOTAL PAYMENT AMOUNT					38,174.92 *	38,174.92	
010476/00	UNIVERSAL ENGINEERING SCIENCES	680190028							
PO-230389	11/07/2023	INV#00754575 DHW RELOCATED MOD	1	22-9359-0-6261-000-9115-8500-050-000	NN P		205.00	205.00	
		TOTAL PAYMENT AMOUNT					205.00 *	205.00	
		TOTAL Fund	PAYMENT				57,526.37 **	57,526.37	

BATCH: 0100 BOND

<< Open >>

Fund : 23 SFID#2 North

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount

015799/00	KITCHENS TO GO	942579843							
PO-230641	11/07/2023	INV#6049 CAFE MODERNIZATION	1	23-9360-0-6210-000-9115-8500-030-000	NN	P		9,909.90	9,909.90
TOTAL PAYMENT AMOUNT								9,909.90 *	9,909.90
012529/00	RGM KRAMER	842164123							
PO-230002	11/07/2023	INV#133921 DHS CAFE MODERN.	1	23-9360-0-6272-000-9115-8500-030-000	NN	P		11,468.24	11,468.24
PO-230008	11/07/2023	INV#133923 WGE WINDOW	1	23-9360-0-6272-000-9115-8500-035-000	NN	F		1,365.32	1,400.00
PO-230084	11/07/2023	INV#133932 MEAS K ROOFING	2	23-9360-0-5800-000-9115-8500-010-000	NN	P		378.73	378.73
TOTAL PAYMENT AMOUNT								13,246.97 *	13,246.97
014049/00	WILSON ARCHITECTURE INC	770266330							
PO-230636	11/07/2023	INV#20230928 CMS RESTROOM	1	23-9360-0-6215-000-9115-8500-102-000	NN	P		18,345.00	18,345.00
PO-230639	11/07/2023	INV#20230929 DHS RESTROOMS	1	23-9360-0-6215-000-9115-8500-101-000	NN	P		8,272.50	8,272.50
PO-230639	11/07/2023	INV#20230828 DHW RESTROOM	1	23-9360-0-6215-000-9115-8500-101-000	NN	P		12,377.50	12,377.50
TOTAL PAYMENT AMOUNT								38,995.00 *	38,995.00
TOTAL Fund PAYMENT				62,151.87 **				62,151.87	
TOTAL BATCH PAYMENT				119,678.24 ***		0.00		119,678.24	

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount

015869/00	ASTA CONSTRUCTION								
PV-240421	11/07/2023	INV#34040		01-0000-0-4300-000-0000-8100-000-000	NN				67.58
PV-240421	11/07/2023	INV#33996		01-0000-0-4300-000-0000-8100-000-000	NN				86.50
		TOTAL PAYMENT AMOUNT			154.08	*			154.08
013722/00	DE LAGE LANDEN PUBLIC FINANCE	721603479							
PV-240422	11/07/2023	INV#81241090 BATES		01-0000-0-5840-213-1110-1000-000-000	NN				1,027.18
		TOTAL PAYMENT AMOUNT			1,027.18	*			1,027.18
015870/00	HAMPTON-WARD, DESAURE								
PV-240441	11/07/2023	PARENT MILEAGE REIMB (OCT)		01-3010-0-5230-000-1422-3600-000-000	NN				328.81
		TOTAL PAYMENT AMOUNT			328.81	*			328.81
015512/00	LEAF	274256501							
PV-240423	11/07/2023	INV#15510197 RVHS		01-0000-0-5840-321-1110-1000-000-000	NY				11.30
PV-240423	11/07/2023	INV#15510193 RVHS		01-0000-0-5840-321-1110-1000-000-000	NY				12.07
PV-240423	11/07/2023	INV#15510194 RMS		01-0000-0-5840-222-1110-1000-000-000	NY				45.42
PV-240423	11/07/2023	INV#15510195 ISLE		01-0000-0-5840-224-1110-1000-000-000	NY				38.29
		TOTAL PAYMENT AMOUNT			107.08	*			107.08
010048/00	RIVER DELTA REVOLVING FUND	941637075							
PV-240425	11/07/2023	#4184 M. PEARL STSP APP. FEE		01-6266-0-5800-000-1110-1000-000-000	NN				100.00
		TOTAL PAYMENT AMOUNT			100.00	*			100.00
000090/00	SACRAMENTO COUNTY UTILITIES	946000529							
PV-240426	11/07/2023	OCT BATES		01-0000-0-5550-000-0000-8100-000-000	NN				113.70
		TOTAL PAYMENT AMOUNT			113.70	*			113.70
012084/00	SODEXO INC & AFFILIATES	520936594							
PV-240427	11/07/2023	SEPT BOARD DINN		01-0000-0-5825-000-0000-7110-000-000	NN				59.33
PV-240427	11/07/2023	PANTHER OF THE MONTH		01-0000-0-5800-000-1110-1000-000-222	NN				20.10
PV-240427	11/07/2023	PANTHER OF THE MONTH		01-0000-0-5800-000-1110-1000-000-222	NN				16.27
PV-240428	11/07/2023	INV#122028 SEPT DAIRY		01-5466-0-4300-000-0000-3700-000-000	NN				8,041.27
PV-240428	11/07/2023	INV#122029 AUG MEAT/PROD.		01-5467-0-4300-000-0000-3700-000-000	NN				1,647.20

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount

012084	(CONTINUED)								
PV-240428	11/07/2023	INV#122030 SEPT MEAT/PROD.			01-5467-0-4300-000-0000-3700-000-000	NN			1,351.81
PV-240428	11/07/2023	INV#122025 PIZZA BOXES			01-0740-0-4300-000-1110-1000-000-214	NN			51.57
		TOTAL PAYMENT AMOUNT							11,187.55 *
003646/00	STATE OF CALIFORNIA								
		946003786							
PV-240429	11/07/2023	INV#685588 FINGERPRINTING			01-0740-0-5800-000-1110-1000-000-213	NN			64.00
PV-240429	11/07/2023	INV#685588 FINGERPRINTING			01-0000-0-5870-000-0000-7400-000-000	NN			239.00
		TOTAL PAYMENT AMOUNT							303.00 *
001896/00	UPS								
		362407381							
PV-240430	11/07/2023	INV#30423 WKLY CHARGES			01-0000-0-5920-000-0000-7200-000-000	NN			91.62
		TOTAL PAYMENT AMOUNT							91.62
		TOTAL Fund	PAYMENT						13,413.02 **

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
015512/00	LEAF	274256501							
PV-240423	11/07/2023	INV#15510198 CAFE		13-5310-0-5840-000-0000-3700-000-000	NY				37.51
PV-240423	11/07/2023	INV#15510193 CAFE		13-5310-0-5840-000-0000-3700-000-000	NY				5.73
		TOTAL PAYMENT AMOUNT							43.24
012084/00	SODEXO INC & AFFILIATES	520936594							
PV-240427	11/07/2023	INV#1002364924 SEPT LUN.BREK.		13-5310-0-5800-000-0000-3700-000-000	NN				61,977.57
PV-240427	11/07/2023	INV#1002364924 SEPT SNACK/SUPP		13-5320-0-5800-000-0000-3700-000-000	NN				12,829.17
PV-240427	11/07/2023	INV#1002364924 CREDIT		13-5310-0-5800-000-0000-3700-000-000	NN				-4,473.05
PV-240427	11/07/2023	INV#1002364924 CREDIT		13-5320-0-5800-000-0000-3700-000-000	NN				-552.85
		TOTAL PAYMENT AMOUNT							69,780.84
		TOTAL Fund	PAYMENT						69,824.08
									69,824.08 **

BATCH: 0101 PAY VOUCHER

<< Open >>

Fund : 23 SFID#2 North

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
013480/00	SHELDON GAS COMPANY	941401690							
PV-240431	11/07/2023	INV#15740983 TEMP KITCHEN PROP		23-9360-0-5800-000-9115-8500-030-000	NN				139.37
		TOTAL PAYMENT AMOUNT							139.37
		TOTAL Fund	PAYMENT						139.37
									139.37 **

BATCH: 0101 PAY VOUCHER

<< Open >>

Fund : 49 CAP.PROJ.FOR BLENDED COMPONENT

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
014818/00	WILLDAN FINANCIAL SERVICES	330302345							
PV-240440	11/07/2023	INV#010-56453 PROF SRVCS		49-9186-0-5800-000-0000-9100-000-000	NN				3,056.40
		TOTAL PAYMENT AMOUNT							3,056.40
		TOTAL Fund	PAYMENT						3,056.40
		TOTAL BATCH PAYMENT						0.00	86,432.87

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
013287/00	ASSOCIATION OF CA SCHOOL	941745199							
PV-240434	11/07/2023	OCT 23 DUES			01-0000-0-5300-000-0000-2700-000-000	NN			167.54
		TOTAL PAYMENT AMOUNT							167.54
									167.54 *
002819/00	DELTA DENTAL INSURANCE COMPANY	000000000							
PV-240433	11/07/2023	NOV 23 PREMIUMS			01-0000-0-3702-000-9590-7200-000-000	NN			48.39
		TOTAL PAYMENT AMOUNT							48.39
									48.39 *
000056/00	SIA VISION SERVICE								
PV-240435	11/07/2023	NOV 23 PREMIUMS			01-0000-0-3701-000-1590-1000-000-000	NN			403.76
PV-240435	11/07/2023	NOV 23 PREMIUMS			01-0000-0-3702-000-9590-7200-000-000	NN			547.96
PV-240435	11/07/2023	NOV 23 PREMIUMS			01-0000-0-3901-000-9133-7200-000-000	NN			28.84
		TOTAL PAYMENT AMOUNT							980.56
									980.56 *
012694/00	US BANK PARS #6746050100								
PV-240436	11/07/2023	GASB 75 NOV 23			01-0000-0-9562-000-0000-0000-000-000	NN			14,854.07
		TOTAL PAYMENT AMOUNT							14,854.07
									14,854.07 *
		TOTAL Fund	PAYMENT						16,050.56 **
		TOTAL BATCH PAYMENT						0.00	16,050.56 ***

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
015275/00	US BANK	000000000							
PV-240437	11/07/2023	NURSE BOOKS	01-0000-0-4300-000-0000-3140-000-000	NN					139.00
PV-240437	11/07/2023	BASC TESTS	01-6500-0-5800-000-5001-3120-000-000	NN					110.00
PV-240437	11/07/2023	LYFT	01-0000-0-5200-000-0000-7400-000-000	NN					42.93
PV-240437	11/07/2023	LYFT	01-0000-0-5200-000-0000-7400-000-000	NN					40.79
PV-240437	11/07/2023	WALMART	01-0000-0-4300-000-0000-7110-000-000	NN					29.07
PV-240437	11/07/2023	COSTCO	01-0000-0-4300-000-0000-7110-000-000	NN					263.06
PV-240437	11/07/2023	AMAZON	01-0000-0-4300-000-0000-7150-000-000	NN					32.10
PV-240437	11/07/2023	AMAZON	01-8150-0-4300-000-9200-8110-000-000	NN					63.60
PV-240437	11/07/2023	CASCWA CONF	01-0000-0-5200-107-0000-2100-000-000	NN					500.00
PV-240437	11/07/2023	HILTON HOTEL (CONF)	01-0000-0-5200-107-0000-2100-000-000	NN					937.59
PV-240437	11/07/2023	HILTON HOTEL (CONF)	01-0000-0-5200-000-0000-7150-000-000	NN					937.59
PV-240437	11/07/2023	HILTON HOTEL (CONF)	01-7311-0-5200-000-0000-7400-000-000	NN					937.59
TOTAL PAYMENT AMOUNT									4,033.32 *
TOTAL Fund PAYMENT									4,033.32 **
TOTAL BATCH PAYMENT									4,033.32 ***
									0.00
									4,033.32

BATCH: 0104 EFT

<< Open >>

Fund : 01 GENERAL FUND

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
012586/00	BAY ALARM COMPANY	941493317	92 FIS/GLOBAL vCard						
PV-240438	11/07/2023	INV#20943720 RMS			01-0000-0-5540-222-0000-8300-000-000	NN		142.83	
PV-240438	11/07/2023	INV#20881638 RMS			01-0000-0-5540-222-0000-8300-000-000	NN		205.40	
PV-240438	11/07/2023	INV#20894116 RMS			01-0000-0-5540-222-0000-8300-000-000	NN		131.27	
PV-240438	11/07/2023	INV#20890644 RMS			01-0000-0-5540-222-0000-8300-000-000	NN		89.84	
PV-240438	11/07/2023	INV#20883914 RMS			01-0000-0-5540-222-0000-8300-000-000	NN		83.33	
PV-240438	11/07/2023	INV#20932020 RMS			01-0000-0-5540-222-0000-8300-000-000	NN		91.44	
PV-240438	11/07/2023	INV#20934306 RMS			01-0000-0-5540-222-0000-8300-000-000	NN		2,177.57	
PV-240438	11/07/2023	INV#20923759 RMS			01-0000-0-5540-222-0000-8300-000-000	NN		116.69	
PV-240438	11/07/2023	INV#20904786 RMS			01-0000-0-5540-222-0000-8300-000-000	NN		75.75	
PV-240438	11/07/2023	INV#20898663 RMS			01-0000-0-5540-222-0000-8300-000-000	NN		65.50	
PV-240439	11/07/2023	INV#20947390 RVHS			01-0000-0-5540-321-0000-8300-000-000	NN		142.83	
PV-240439	11/07/2023	INV#20944758 RVHS			01-0000-0-5540-321-0000-8300-000-000	NN		142.83	
PV-240439	11/07/2023	INV#20948226 RVHS			01-0000-0-5540-321-0000-8300-000-000	NN		142.83	
PV-240439	11/07/2023	INV#20892718 RVHS			01-0000-0-5540-321-0000-8300-000-000	NN		154.25	
PV-240439	11/07/2023	INV#2089150 RVHS			01-0000-0-5540-321-0000-8300-000-000	NN		37.99	
PV-240439	11/07/2023	INV#20888835 RVHS			01-0000-0-5540-321-0000-8300-000-000	NN		102.54	
PV-240439	11/07/2023	INV#20933106 RVHS			01-0000-0-5540-321-0000-8300-000-000	NN		189.31	
PV-240439	11/07/2023	INV#20923917 RVHS			01-0000-0-5540-321-0000-8300-000-000	NN		121.77	
PV-240439	11/07/2023	INV#20920896 RVHS			01-0000-0-5540-321-0000-8300-000-000	NN		51.33	
PV-240439	11/07/2023	INV#20920800 RVHS			01-0000-0-5540-321-0000-8300-000-000	NN		114.32	
PV-240439	11/07/2023	INV#20917830 RVHS			01-0000-0-5540-321-0000-8300-000-000	NN		46.23	
PV-240439	11/07/2023	INV#20910009 RVHS			01-0000-0-5540-321-0000-8300-000-000	NN		679.06	
PV-240439	11/07/2023	INV#20908290 RVHS			01-0000-0-5540-321-0000-8300-000-000	NN		203.18	
TOTAL PAYMENT AMOUNT								5,308.09 *	5,308.09
TOTAL Fund				CHECKS	0.00 **			0.00	
TOTAL Fund				EFT	5,308.09 **			5,308.09	
TOTAL Fund				PAYMENT	5,308.09 **			5,308.09	

BATCH: 0104 EFT

<< Open >>

Fund : 25 CAPITAL FACILITIES FUND

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
012528/00	WILLSCOT	520665775	92 FIS/GLOBAL vCard						
PV-240432	11/07/2023	INV#9018992006	RVHS MOD	25-9010-0-5630-000-0000-8700-096-321	NN			1,362.79	
PV-240432	11/07/2023	INV#9018992004	RMS MOD	25-9010-0-5630-000-0000-8700-095-222	NN			1,383.54	
PV-240432	11/07/2023	INV#9018992005	RMS MOD	25-9010-0-5630-000-0000-8700-095-222	NN			1,383.54	
TOTAL PAYMENT AMOUNT				4,129.87	*			4,129.87	
TOTAL Fund				CHECKS	0.00	**		0.00	
TOTAL Fund				EFT	4,129.87	**		4,129.87	
TOTAL Fund				PAYMENT	4,129.87	**		4,129.87	
TOTAL BATCH CHECKS				0.00	***		0.00	0.00	
TOTAL BATCH EFT				9,437.96	***		0.00	9,437.96	
TOTAL BATCH PAYMENT				9,437.96	***		0.00	9,437.96	
TOTAL DISTRICT CHECKS				226,694.99	****		0.00	226,694.99	
TOTAL DISTRICT EFT				9,437.96	****		0.00	9,437.96	
TOTAL DISTRICT PAYMENT				236,132.95	****		0.00	236,132.95	
TOTAL FOR ALL DISTRICTS CHK:				226,694.99	****		0.00	226,694.99	
TOTAL FOR ALL DISTRICTS EFT:				9,437.96	****		0.00	9,437.96	
TOTAL FOR ALL DISTRICTS:				236,132.95	****		0.00	236,132.95	

Number of checks to be printed: 25, not counting voids due to stub overflows. 226,694.99
 Number of EFT generated: 2 9,437.96

Batch status: A All

From batch: 0105

To batch: 0110

Include Revolving Cash: Y

Include Address: N

Include Object Desc: N

Include Vendor TIN: Y

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE	ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1	Op2	T9MPS	Liq Amt	Net Amount

015860/00	ACCURATE LABEL DESIGNS INC									
240334	PO-240313	11/15/2023	INV#175545	VISITOR LABELS	1	01-0000-0-4300-000-1110-1000-000-321	NN	F	155.95	155.95
				TOTAL PAYMENT AMOUNT					155.95 *	155.95
015817/00	ACUMEN NEUROPSYCHOLOGY SERVICE 407825807									
240071	PO-240067	11/16/2023	INV#2531	ED EVAL.	1	01-6500-0-5800-000-5770-1190-000-000	NN	F	7,300.00	7,300.00
				TOTAL PAYMENT AMOUNT					7,300.00 *	7,300.00
015161/00	BRG PUBLICATIONS									
240215	PO-240190	11/16/2023	INV#6797	PICKUP CAR TAGS	1	01-1100-0-4300-000-1110-1000-000-223	NN	F	317.50	317.50
				TOTAL PAYMENT AMOUNT					317.50 *	317.50
013205/00	CALIFORNIA FFA									
240348	PO-240317	11/16/2023	INV#113760	23-24 AG ED LDRSHP	1	01-0000-0-5200-000-1215-1000-800-311	NN	F	555.00	555.00
240348	PO-240317	11/16/2023	INV#113760	23-24 AG ED LDRSHP	2	01-7010-0-5200-000-1215-1000-800-311	NN	F	555.00	555.00
				TOTAL PAYMENT AMOUNT					1,110.00 *	1,110.00
013876/00	DATAPATH 900242296									
240343	PO-240312	11/16/2023	INV#167079	CHROME LICNS DHS	1	01-3213-0-5800-000-1110-1000-000-311	NN	F	1,605.01	1,484.40
240343	PO-240312	11/16/2023	INV#167079	CHROME LICNS CMS	2	01-3213-0-5800-000-1110-1000-000-210	NN	F	1,605.01	1,484.40
240343	PO-240312	11/16/2023	INV#167079	CHROME LICNS RMS	3	01-0000-0-5800-000-1110-1000-000-222	NN	F	601.88	556.65
240343	PO-240312	11/16/2023	INV#167079	CHROME LICNS ISLE	4	01-0000-0-5800-000-1110-1000-000-224	NN	F	722.25	667.98
				TOTAL PAYMENT AMOUNT					4,193.43 *	4,193.43
015661/00	GLASSWEST INC 205503668									
240125	PO-240110	11/16/2023	INV#48913	DHS REPAIR	1	01-8150-0-5800-000-0000-8110-000-000	NN	F	387.50	387.50
				TOTAL PAYMENT AMOUNT					387.50 *	387.50
003598/00	GRAINGER 361150280									
240035	PO-240019	11/15/2023	INV#9869459009	MAINT SUPPL	1	01-8150-0-4300-000-0000-8110-000-000	NN	F	140.92	258.49
				TOTAL PAYMENT AMOUNT					258.49 *	258.49

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE	ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1	Op2	T9MPS	Liq Amt	Net Amount
013895/00	NCS PEARSON	221603684								
240358	PO-240323 11/15/2023	INV#23712423 PSYCH SUPPL	1	01-6500-0-4300-000-5001-3120-000-000	NN	F			368.49	369.49
240358	PO-240323 11/16/2023	INV#23712423 OSYCH SUPPL	2	01-6500-0-5800-000-5001-3120-000-000	NN	F			34.08	21.12
		TOTAL PAYMENT AMOUNT							390.61 *	390.61
002847/00	SCHOOL MATE									
	Sales Permit/Use Tax: Y Sales Permit Expiration Date:									
240006	PO-240004 11/15/2023	INV#00598863 ISLE SUPPL	1	01-3010-0-4300-000-1110-1000-000-224	NN	P			483.60	483.60
240006	PO-240004 11/15/2023	INV#000599065 ISLE SUPPL	1	01-3010-0-4300-000-1110-1000-000-224	NN	F			282.65	249.00
		TOTAL PAYMENT AMOUNT							732.60 *	732.60
015151/00	TURF STAR	942525925								
240178	PO-240194 11/16/2023	INV#7306816-00 MOTOR BLADES	1	01-0000-0-4300-000-0000-8100-000-000	NN	F			446.61	446.60
240178	PO-240194 11/16/2023	INV#7306816-00 MOTOR BLADES	2	01-0000-0-5800-000-0000-8100-000-000	NN	F			49.63	49.63
		TOTAL PAYMENT AMOUNT							496.23 *	496.23
000679/00	WARREN E GOMES EXCAVATING INC	942147241								
240091	PO-240077 11/16/2023	INV#3930 DIST OFF PARKING LOT	1	01-8150-0-5800-000-9528-8110-000-000	NN	F			9,365.00	9,164.00
240091	PO-240077 11/16/2023	INV#3930 DIST OFF PARKING LOT	2	01-8150-0-4300-000-9528-8110-000-000	NN	F			45,151.27	49,029.20
		TOTAL PAYMENT AMOUNT							58,193.20 *	58,193.20
		TOTAL Fund	PAYMENT						73,535.51 **	73,535.51

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
012757/00	DIVISION OF STATE ARCHITECT	680142725							
240404	PO-240360	11/16/2023	DSA FEE RMS MODERNIZATION	1	22-9359-0-6201-000-9115-8500-070-000	NN F		47,400.00	47,400.00
240405	PO-240361	11/16/2023	DSA FEE RVHS GYM AND LOCKER	1	22-9359-0-6201-000-9115-8500-085-000	NN F		41,100.00	41,100.00
240406	PO-240362	11/16/2023	DSA FEE DHW	1	22-9359-0-6201-000-9115-8500-080-000	NN F		33,960.00	33,960.00
			TOTAL PAYMENT AMOUNT		122,460.00	*			122,460.00
			TOTAL Fund	PAYMENT	122,460.00	**			122,460.00
			TOTAL BATCH PAYMENT		195,995.51	***	0.00		195,995.51

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
000009/00	ABEL CHEVROLET-PONTIAC-BUICK	940266430							
240098	PO-240089 11/16/2023	INV#53450 DIST VEHIC. PARTS	2	01-0720-0-4300-000-0000-3600-000-000	NN P			50.00	50.00
		TOTAL PAYMENT AMOUNT						50.00 *	50.00
015832/00	ASCEND REHAD SERVICES	200927823							
240297	PO-240270 11/16/2023	INV#AR10152023 SPCH THRPY	1	01-6500-0-5100-000-5750-1190-000-000	NN P			13,724.00	13,724.00
240297	PO-240270 11/16/2023	INV#AR09302023 SPCH THRPY	1	01-6500-0-5100-000-5750-1190-000-000	NN P			13,634.00	13,634.00
		TOTAL PAYMENT AMOUNT						27,358.00 *	27,358.00
015255/00	BUSLOOP	834345282	92	FIS/GLOBAL vCard					
240245	PO-240232 11/16/2023	INV#0912023 CHARTER BUS	1	01-0000-0-5895-000-1690-4200-000-321	NN P			1,575.00	1,575.00
240245	PO-240232 11/16/2023	INV#102272023 CHARTER BUS	1	01-0000-0-5895-000-1690-4200-000-321	NN P			1,575.00	1,575.00
		TOTAL PAYMENT AMOUNT						3,150.00 *	3,150.00
014242/00	CAMACHO MECHANICAL	271604281							
240300	PO-240273 11/15/2023	INV#8861 BATES SRVCS AND PARTS	1	01-8150-0-5800-000-0000-8110-000-000	NY P			300.00	300.00
240300	PO-240273 11/16/2023	INV#8861 BATES SRVCING	2	01-8150-0-4300-000-0000-8110-000-000	NY P			61.87	61.87
		TOTAL PAYMENT AMOUNT						361.87 *	361.87
015654/00	CAPITAL KIDS OCCUPATIONAL								
240164	PO-240148 11/16/2023	INV#CK23038 OCT SRVCS	1	01-6500-0-5800-000-5770-1190-000-000	NN P			5,760.00	5,760.00
		TOTAL PAYMENT AMOUNT						5,760.00 *	5,760.00
014824/00	J & D WHOLESALE	000000000							
240285	PO-240263 11/16/2023	INV#06305223 FLORAL SUPPL	1	01-0000-0-4300-000-1215-1000-800-321	NN P			98.38	98.38
240285	PO-240263 11/16/2023	INV#06305223 FLORAL SUPPL	2	01-7010-0-4300-000-1215-1000-800-321	NN P			98.37	98.37
		TOTAL PAYMENT AMOUNT						196.75 *	196.75
015784/00	JIBBER JABBER SPEECH LLC	883229730	82	FIS/GLOBAL ACH					
240330	PO-240301 11/16/2023	INV#7 SPCH THRPY	1	01-6547-0-5800-000-5770-1190-000-000	NY P			3,187.50	3,187.50
		TOTAL PAYMENT AMOUNT						3,187.50 *	3,187.50

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
000548/00	LIRAS SUPERMARKET	680260589							
240219	PO-240199	11/15/2023	RDHES SUPPLY	10/2-10/31	1	01-0000-0-4300-000-1110-1000-000-222	NN P	291.59	291.59
240219	PO-240199	11/15/2023	RDHES SUPPLY	10/2-10/31	2	01-0740-0-4300-000-1110-1000-000-222	NN P	194.39	194.39
240287	PO-240264	11/15/2023	RVHS SUPPLIES	10/2-10/30	1	01-0000-0-4300-000-1110-1000-000-321	NN P	682.32	682.32
			TOTAL PAYMENT AMOUNT			1,168.30	*		1,168.30
014107/00	MCCARTY, MELADEE	569848465							
240151	PO-240135	11/16/2023	OCT SRVCS		1	01-6547-0-5800-000-5770-1190-000-000	NY P	1,100.00	1,100.00
			TOTAL PAYMENT AMOUNT			1,100.00	*		1,100.00
015696/00	NORTHERN CALIFORNIA								
240166	PO-240150	11/16/2023	INV#NCPS5480	NPS SRVCS	1	01-6500-0-5100-000-5750-1180-000-000	NN P	2,616.00	2,616.00
240166	PO-240150	11/16/2023	INV#NCPS5497	NPS SRVCS	1	01-6500-0-5100-000-5750-1180-000-000	NN P	248.90	248.90
			TOTAL PAYMENT AMOUNT			2,864.90	*		2,864.90
015865/00	PACIFIC SOUTHWEST IRRIGATION	383682556							
240367	PO-240331	11/16/2023	INV#DI894	DHW PUMP	2	01-8150-0-4400-000-0000-8110-000-000	NN P	4,100.00	4,100.00
			TOTAL PAYMENT AMOUNT			4,100.00	*		4,100.00
014333/00	PROCARE THERAPY	261251927							
240296	PO-240269	11/16/2023	INV#20804716	PARAPROFESS.	1	01-6500-0-5100-000-5750-1190-000-000	NN P	2,340.00	2,340.00
240296	PO-240269	11/16/2023	INV#20798505	PARAPROFESS.	1	01-6500-0-5100-000-5750-1190-000-000	NN P	1,920.00	1,920.00
			TOTAL PAYMENT AMOUNT			4,260.00	*		4,260.00
014859/00	RIO VISTA BAKERY & CAFE								
240184	PO-240171	11/16/2023	INV#95987	RVHSS COLLEGE FAIR	1	01-0000-0-4300-000-1110-1000-000-321	NN P	186.52	186.52
			TOTAL PAYMENT AMOUNT			186.52	*		186.52
002751/00	RIO VISTA FORD	680376158							
240103	PO-240091	11/15/2023	INV#130726	DIST VEHIC. PARTS	1	01-0720-0-4300-000-0000-3600-000-000	NN P	104.62	104.62
240103	PO-240091	11/15/2023	INV#130791	DIST VEHIC. PARTS	1	01-0720-0-4300-000-0000-3600-000-000	NN P	51.90	51.90
240103	PO-240091	11/15/2023	INV#130836	DIST VEHIC. PARTS	2	01-0720-0-4400-000-0000-3600-000-000	NN P	589.94	589.94
			TOTAL PAYMENT AMOUNT			746.46	*		746.46

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
013898/00	SCHOOL SPECIALTY	390971239							
240131	PO-240115 11/15/2023	INV#208133214631	DHS SUPPL	1	01-0000-0-4300-000-1110-1000-000-311	NN P		132.95	132.95
240131	PO-240115 11/15/2023	INV#308104413326	DHS SUPPL	1	01-0000-0-4300-000-1110-1000-000-311	NN P		121.36	121.36
			TOTAL PAYMENT AMOUNT					254.31 *	254.31
014444/00	SEQUOIA FLORAL	942689120							
240284	PO-240262 11/16/2023	INV#108292	FLORAL SUPPL	1	01-0000-0-4300-000-1215-1000-800-321	NN P		62.09	62.09
240284	PO-240262 11/16/2023	INV#108290	FLORAL SUPPL	1	01-0000-0-4300-000-1215-1000-800-321	NN P		194.66	194.66
240284	PO-240262 11/16/2023	INV#110258	FLORAL SUPPL	1	01-0000-0-4300-000-1215-1000-800-321	NN P		140.24	140.24
240284	PO-240262 11/16/2023	INV#108292	FLORAL SUPPL.	2	01-7010-0-4300-000-1215-1000-800-321	NN P		62.08	62.08
240284	PO-240262 11/16/2023	INV#108290	FLORAL SUPPL	2	01-7010-0-4300-000-1215-1000-800-321	NN P		194.65	194.65
240284	PO-240262 11/16/2023	INV#110258	FLORAL SUPPL	2	01-7010-0-4300-000-1215-1000-800-321	NN P		140.23	140.23
			TOTAL PAYMENT AMOUNT					793.95 *	793.95
013540/00	SOLIANT HEALTH	000000000							
240270	PO-240243 11/16/2023	INV#20804531	BCBA	1	01-6500-0-5800-000-5770-1190-000-000	NN P		1,768.00	1,768.00
240270	PO-240243 11/16/2023	INV#20805948	BCBA	1	01-6500-0-5800-000-5770-1190-000-000	NN P		12,661.30	12,661.30
240270	PO-240243 11/16/2023	INV#20800003	BCBA	1	01-6500-0-5800-000-5770-1190-000-000	NN P		14,426.25	14,426.25
			TOTAL PAYMENT AMOUNT					28,855.55 *	28,855.55
000096/00	STEWART INDUSTRIAL SUPPLY INC	680224275							
240081	PO-240061 11/16/2023	10/10-10/24	TRANSPORT SUPPL	1	01-0720-0-4300-000-0000-3600-000-000	NN P		399.45	399.45
			TOTAL PAYMENT AMOUNT					399.45 *	399.45
015854/00	THE GENESIS GROUP	834326065							
240345	PO-240315 11/16/2023	INV#23282017	OCT SRVCS	1	01-6500-0-5800-000-5770-1190-000-000	NN P		1,168.00	1,168.00
240345	PO-240315 11/16/2023	INV#23303018A	OCT SRVCS	1	01-6500-0-5800-000-5770-1190-000-000	NN P		93.66	93.66
240345	PO-240315 11/16/2023	INV#23303018	OCT SRVCS	1	01-6500-0-5800-000-5770-1190-000-000	NN F		2,532.84	2,336.00
			TOTAL PAYMENT AMOUNT					3,597.66 *	3,597.66
015790/00	THE RADIO GUYS	844593673							
240066	PO-240047 11/15/2023	INV#24498	NEXEDGE NETWORK	1	01-0720-0-5910-000-0000-3600-000-000	NN P		400.00	400.00
240066	PO-240047 11/15/2023	INV#24712	NEXEDGE NETWORK	1	01-0720-0-5910-000-0000-3600-000-000	NN P		400.00	400.00
			TOTAL PAYMENT AMOUNT					800.00 *	800.00

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE	ES	E-Term	E-ExtRef		
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1	Op2	T9MPS	Liq Amt	Net Amount	
000104/00	WARREN'S MACHINE & WELDING	680114089									
240212	PO-240188	11/16/2023	INV#23958	SHOP	SUPPL	1	01-0000-0-4300-000-1215-1000-800-311	N7	P	34.86	34.86
240212	PO-240188	11/16/2023	INV#23943	SHOP	SUPPL	1	01-0000-0-4300-000-1215-1000-800-311	N7	P	246.25	246.25
240212	PO-240188	11/16/2023	INV#23958	SHOP	SUPPL	2	01-7010-0-4300-000-1215-1000-800-311	N7	P	34.85	34.85
240212	PO-240188	11/16/2023	INV#23943	SHOP	SUPPL	2	01-7010-0-4300-000-1215-1000-800-311	N7	P	246.24	246.24
TOTAL PAYMENT AMOUNT							562.20	*			562.20
TOTAL Fund				CHECKS			83,415.92	**			83,415.92
TOTAL Fund				EFT			6,337.50	**			6,337.50
TOTAL Fund				PAYMENT			89,753.42	**			89,753.42

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE	ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1	Op2	T9MPS	Liq Amt	Net Amount
014082/00	CAS INSPECTION INC	320351241								
PO-230652	11/16/2023	INV#2598 RVHS CULIN ARTS BUILD	1	22-9359-0-6261-000-9115-8500-025-000	NN	P			20,000.00	20,000.00
PO-230652	11/16/2023	INV#2592 RVHS CULIN ARTS BUILD	1	22-9359-0-6261-000-9115-8500-025-000	NN	P			20,000.00	20,000.00
		TOTAL PAYMENT AMOUNT							40,000.00 *	40,000.00
		TOTAL Fund	PAYMENT						40,000.00 **	40,000.00
		TOTAL BATCH CHECKS			123,415.92 ***			0.00		123,415.92
		TOTAL BATCH EFT			6,337.50 ***			0.00		6,337.50
		TOTAL BATCH PAYMENT			129,753.42 ***			0.00		129,753.42

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
015007/00	AMS.NET	943291626							
PV-240467	11/15/2023	INV#SIN057124			01-0000-0-6500-000-9172-7200-000-000	NN			1,024.32
PV-240467	11/15/2023	INV#SIN056877			01-0000-0-6500-000-9172-7200-000-000	NN			1,707.20
PV-240467	11/15/2023	INV#SIN057119			01-0000-0-6500-000-9172-7200-000-000	NN			682.88
PV-240467	11/15/2023	INV#SIN057122			01-0000-0-6500-000-9172-7200-000-000	NN			1,707.20
		TOTAL PAYMENT AMOUNT			5,121.60	*			5,121.60
014768/00	ASCAP								
PV-240494	11/16/2023	RADIO RIO SRVCS			01-0000-0-5800-000-1110-1000-000-915	NN			390.00
		TOTAL PAYMENT AMOUNT			390.00	*			390.00
013642/00	BLACK POINT ENVIRONMENTAL INC	204093519							
PV-240476	11/15/2023	INV#2030 PROF SRVCS			01-8150-0-5800-000-0000-8110-000-000	NN			701.48
		TOTAL PAYMENT AMOUNT			701.48	*			701.48
012497/00	BUSWEST	270746875							
PV-240497	11/16/2023	INV#400079985:01 BUS PARTS			01-0720-0-4400-000-0000-3600-000-000	NN			1,523.19
PV-240497	11/16/2023	INV#400079985:01 BUS PARTS			01-0720-0-4300-000-0000-3600-000-000	NN			360.43
PV-240497	11/16/2023	INV#410045664:01 BUS PARTS			01-0720-0-4300-000-0000-3600-000-000	NN			82.29
PV-240497	11/16/2023	INV#410046592:01 BUS PARTS			01-0720-0-4300-000-0000-3600-000-000	NN			1,069.16
PV-240497	11/16/2023	INV#410045692:01 BUS PARTS			01-0720-0-4300-000-0000-3600-000-000	NN			145.63
PV-240497	11/16/2023	INV#410045958:01 BUS PARTS			01-0720-0-4300-000-0000-3600-000-000	NN			293.71
		TOTAL PAYMENT AMOUNT			3,474.41	*			3,474.41
003681/00	CALIFORNIA AMERICAN WATER	510104148							
PV-240457	11/15/2023	ACCT#9749496 ISLE WATER			01-0000-0-5520-000-0000-8100-000-000	NN			413.89
PV-240457	11/15/2023	ACCT#9402650 ISLE WATER			01-0000-0-5520-000-0000-8100-000-000	NN			785.89
PV-240457	11/15/2023	ACCT#9334092 ISLE WATER			01-0000-0-5520-000-0000-8100-000-000	NN			372.23
		TOTAL PAYMENT AMOUNT			1,572.01	*			1,572.01
013401/00	CALIFORNIA DEPT OF TAX AND FEE								
PV-240477	11/15/2023	FULE TAX 7/1-9/30			01-0720-0-4340-000-0000-3600-000-000	NN			25.00
		TOTAL PAYMENT AMOUNT			25.00	*			25.00

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount

012268/00	CALIFORNIA WASTE RECOVERY								
PV-240456	11/15/2023	OCT ISLE WST		01-0000-0-5525-000-0000-8100-000-000	NN				65.36
		TOTAL PAYMENT AMOUNT							65.36
									65.36
003380/00	CENTRAL VALLEY WASTE SERVICE								
PV-240462	11/15/2023	MOKE WASTE		01-0000-0-5525-000-0000-8100-000-000	NN				84.70
PV-240462	11/15/2023	CLRKSBRG BS GRGE WASTE		01-0000-0-5525-000-0000-8100-000-000	NN				141.20
PV-240462	11/15/2023	BATES WASTE		01-0000-0-5515-000-0000-8100-000-000	NN				710.89
PV-240462	11/15/2023	WGE WASTE		01-0000-0-5515-000-0000-8100-000-000	NN				1,149.40
		TOTAL PAYMENT AMOUNT							2,086.19
									2,086.19
000201/00	CITY OF ISLETON	946000349							
PV-240464	11/15/2023	INV#97884 OCT ISLE WATER		01-0000-0-5550-224-0000-8200-000-000	NN				411.05
		TOTAL PAYMENT AMOUNT							411.05
									411.05
000077/00	CITY OF RIO VISTA	946000404							
PV-240453	11/15/2023	RVHS MTR#83071643 SWR		01-0000-0-5550-000-0000-8100-000-000	NN				40.73
PV-240453	11/15/2023	RVHS MTR#84221509 SWR		01-0000-0-5550-000-0000-8100-000-000	NN				3,273.73
PV-240453	11/15/2023	RMS MTR#83100904 SWR		01-0000-0-5550-000-0000-8100-000-000	NN				504.84
PV-240453	11/15/2023	DHW MTR#83100899 SWR		01-0000-0-5550-000-0000-8100-000-000	NN				1,574.62
PV-240453	11/15/2023	RVHS MTR#83071643 WTR		01-0000-0-5520-000-0000-8100-000-000	NN				88.03
PV-240453	11/15/2023	RVHS MTR#84221509 WTR		01-0000-0-5520-000-0000-8100-000-000	NN				1,056.68
PV-240453	11/15/2023	RMS MTR#83100904 WTR		01-0000-0-5520-000-0000-8100-000-000	NN				579.69
PV-240453	11/15/2023	DHW MTR#83100899 WTR		01-0000-0-5520-000-0000-8100-000-000	NN				364.68
PV-240453	11/15/2023	DIST OFFICE		01-0000-0-5520-000-0000-8100-000-000	NN				174.99
PV-240453	11/15/2023	RMS MTR#89338475 WTR		01-0000-0-5520-000-0000-8100-000-000	NN				699.50
PV-240453	11/15/2023	DHW MTR#83071642 WTR		01-0000-0-5520-000-0000-8100-000-000	NN				103.12
PV-240453	11/15/2023	DHW MTR#8310093 WTR		01-0000-0-5520-000-0000-8100-000-000	NN				296.33
PV-240453	11/15/2023	DHW MTR#82723108 WTR		01-0000-0-5520-000-0000-8100-000-000	NN				504.06
PV-240453	11/15/2023	RVHS MTR#75183805 WTR		01-0000-0-5520-000-0000-8100-000-000	NN				925.61
PV-240453	11/15/2023	RVHS MTR#82723111 WTR		01-0000-0-5520-000-0000-8100-000-000	NN				511.21
		TOTAL PAYMENT AMOUNT							10,697.82
									10,697.82
015748/00	CONCORD GLASS, INC	264283984							
PV-240495	11/16/2023	INV#78363 RVHS GLASS REPAIR		01-8150-0-5800-000-0000-8110-000-000	NN				897.64
		TOTAL PAYMENT AMOUNT							897.64
									897.64

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
000162/00	COUNTY OF SACRAMENTO EMD	946000529							
PV-240493	11/16/2023	INV#608099		01-0720-0-5800-214-0000-3600-000-000	NN			1,740.00	
PV-240493	11/16/2023	INV#608085		01-0720-0-5800-213-0000-3600-000-000	NN			1,740.00	
		TOTAL PAYMENT AMOUNT			3,480.00 *			3,480.00	
012807/00	DELTA ELEMENTARY CHARTER								
PV-240499	11/16/2023	NOV TAX IN LIEU		01-0000-0-8096-000-0000-0000-000-000	NN			155,259.00	
		TOTAL PAYMENT AMOUNT			155,259.00 *			155,259.00	
015781/00	DOWNTOWN FORD SALES INC.	941586562							
PV-240500	11/16/2023	NEW DIST VEHIC FOR TRANSPORT		01-0720-0-6400-000-0000-3600-000-000	NN			47,614.78	
		TOTAL PAYMENT AMOUNT			47,614.78 *			47,614.78	
015659/00	EDWARDS, STEVENS, AND TUCKER	814627833							
PV-240472	11/15/2023	INV#5261 PROF SRVCS		01-0000-0-5880-000-9200-7160-000-000	NY			1,519.00	
PV-240472	11/15/2023	INV#5261 PROF SRVCS		01-0000-0-5880-000-0000-7120-000-000	NY			2,759.00	
		TOTAL PAYMENT AMOUNT			4,278.00 *			4,278.00	
011339/00	FRONTIER	060619596							
PV-240450	11/15/2023	070122-8 BIIG		01-0000-0-5910-000-9670-2420-000-000	NN			10,120.17	
PV-240450	11/15/2023	DIST WIDE		01-0000-0-5910-000-0000-7200-000-000	NN			4,976.91	
		TOTAL PAYMENT AMOUNT			15,097.08 *			15,097.08	
015675/00	HANNICKEL, TOM								
PV-240471	11/15/2023	BAND CLASS SRVSC		01-0000-0-4300-000-1110-1000-000-210	NN			689.00	
		TOTAL PAYMENT AMOUNT			689.00 *			689.00	
015512/00	LEAF	274256501							
PV-240460	11/15/2023	INV#15559273 DHS		01-0000-0-5840-311-1110-1000-000-000	NY			951.71	
PV-240460	11/15/2023	INV#15559272 DHW		01-0000-0-5840-223-1110-1000-000-000	NY			667.14	
		TOTAL PAYMENT AMOUNT			1,618.85 *			1,618.85	

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
014819/00	MAVERICK NETWORKS INC.	113739791							
PV-240451	11/15/2023	INV#2302147 PHONE PARTS		01-0000-0-5800-000-0000-7200-000-000	NN			300.00	
PV-240451	11/15/2023	INV#2302147 PHONE SRVCS		01-0000-0-4300-000-0000-7200-000-000	NN			63.25	
PV-240451	11/15/2023	INV#2302155 PHONE SRVCS		01-0000-0-5800-000-0000-7200-000-000	NN			120.00	
		TOTAL PAYMENT AMOUNT			483.25 *			483.25	
012735/00	MCKINLEY ELEVATOR CORP.	550880265							
PV-240496	11/16/2023	INV#A169977-IN PERMIT		01-8150-0-5800-000-0000-8110-000-000	NN			300.00	
		TOTAL PAYMENT AMOUNT			300.00 *			300.00	
010239/00	MDRR-RIO VISTA	000000000							
PV-240465	11/15/2023	OCT RMS		01-0000-0-5525-000-0000-8100-000-000	NN			670.05	
PV-240465	11/15/2023	OCT DIST OFF		01-0000-0-5525-000-0000-8100-000-000	NN			138.02	
PV-240465	11/15/2023	RVHS DEBRIS BOX		01-0000-0-5525-000-0000-8100-000-000	NN			571.55	
PV-240465	11/15/2023	OCT DHW		01-0000-0-5525-000-0000-8100-000-000	NN			1,378.50	
PV-240465	11/15/2023	OCT RVHS		01-0000-0-5525-000-0000-8100-000-000	NN			1,480.95	
PV-240465	11/15/2023	RVHS DEBRIS BOX		01-0000-0-5525-000-0000-8100-000-000	NN			416.00	
		TOTAL PAYMENT AMOUNT			4,655.07 *			4,655.07	
015147/00	MICHAEL'S TRANSPORTATION SERV								
PV-240473	11/15/2023	INV#122508		01-6500-0-5800-000-0000-3600-000-000	NN			1,635.00	
PV-240473	11/15/2023	INV#122465		01-6500-0-5800-000-0000-3600-000-000	NN			1,635.00	
		TOTAL PAYMENT AMOUNT			3,270.00 *			3,270.00	
015169/00	MORGAN, DENISE								
PV-240491	11/16/2023	INV#B6586982		01-6500-0-5800-000-5770-1130-000-000	NN			900.00	
PV-240491	11/16/2023	INV#B6605253		01-6500-0-5800-000-5770-1130-000-000	NN			900.00	
		TOTAL PAYMENT AMOUNT			1,800.00 *			1,800.00	
000358/00	NATIONAL FFA ORGANIZATION	540524844							
PV-240475	11/15/2023	INV#MDS295146 DHS FFA SUPPL		01-0000-0-4300-000-1110-1000-800-311	NN			139.00	
PV-240475	11/15/2023	INV#MDS295146 DHS FFA SUPPL		01-7010-0-4300-000-1110-1000-800-311	NN			139.00	
		TOTAL PAYMENT AMOUNT			278.00 *			278.00	

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
014465/00	PARKER & COVERT	LAW OFFICE	330920915						
PV-240469	11/15/2023	INV#76358 PROF SRVCS		01-0000-0-5880-000-0000-7160-000-000	NY			6,064.00	
PV-240469	11/15/2023	INV#76358 PROF SRVCS		01-0000-0-5880-000-0000-7160-000-915	NY			2,361.00	
PV-240470	11/15/2023	INV#76359 PROF SRVCS		01-0000-0-5880-000-0000-7160-000-000	NY			681.00	
TOTAL PAYMENT AMOUNT								9,106.00 *	9,106.00
011770/00	QUALITY SOUND SYSTEMS								
PV-240474	11/15/2023	INV#9687 DHS SYSTEM SRVCS		01-8150-0-5800-000-0000-8110-000-000	NN			2,844.48	
TOTAL PAYMENT AMOUNT								2,844.48 *	2,844.48
012362/00	SACRAMENTO COUNTY								
PV-240468	11/15/2023	PROPERTT TAXES		01-0000-0-5800-224-0000-8200-000-000	NN			969.00	
PV-240468	11/15/2023	PROPERTT TAXES		01-0000-0-5800-213-0000-8200-000-000	NN			653.92	
PV-240468	11/15/2023	PROPERTT TAXES		01-0000-0-5800-335-0000-8200-000-000	NN			136.92	
PV-240468	11/15/2023	PROPERTT TAXES		01-0000-0-5800-224-0000-8200-000-000	NN			541.80	
PV-240468	11/15/2023	PROPERTT TAXES		01-0000-0-5800-224-0000-8200-000-000	NN			50.00	
PV-240468	11/15/2023	PROPERTT TAXES		01-0000-0-5800-224-0000-8200-000-000	NN			50.00	
PV-240468	11/15/2023	PROPERTT TAXES		01-0000-0-5800-214-0000-8200-000-000	NN			452.56	
PV-240468	11/15/2023	PROPERTT TAXES		01-0000-0-5800-224-0000-8200-000-000	NN			3,049.80	
TOTAL PAYMENT AMOUNT								5,904.00 *	5,904.00
000090/00	SACRAMENTO COUNTY UTILITIES	946000529							
PV-240466	11/15/2023	BATES NOV		01-0000-0-5550-000-0000-8100-000-000	NN			113.70	
PV-240466	11/15/2023	WGE NOV		01-0000-0-5550-000-0000-8100-000-000	NN			175.10	
TOTAL PAYMENT AMOUNT								288.80 *	288.80
000316/00	SCHOOLS INSURANCE AUTHORITY	942637043							
PV-240455	11/15/2023	OCT INV#EAP7-102024.15		01-0000-0-3401-000-0000-7200-000-000	NN			314.72	
PV-240455	11/15/2023	OCT INV#EAP7-102024.15		01-0000-0-3402-000-0000-7200-000-000	NN			302.38	
PV-240455	11/15/2023	NOV INV#EAP7-112024.15		01-0000-0-3401-000-0000-7200-000-000	NN			314.72	
PV-240455	11/15/2023	NOV INV#EAP7-112024.15		01-0000-0-3402-000-0000-7200-000-000	NN			302.38	
TOTAL PAYMENT AMOUNT								1,234.20 *	1,234.20

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
013480/00	SHELDON GAS COMPANY	941401690							
PV-240458	11/15/2023	INV#16219875 MOKE PROPANE		01-0000-0-5515-000-0000-8100-000-000	NN			623.71	
		TOTAL PAYMENT AMOUNT		623.71 *				623.71	
000095/00	SMUD	000000000							
PV-240459	11/15/2023	ACCT#376785		01-0000-0-5510-000-0000-8100-000-000	NN			14.24	
PV-240459	11/15/2023	ACCT#376135		01-0000-0-5510-000-0000-8100-000-000	NN			28.49	
PV-240459	11/15/2023	ACCT#311497		01-0000-0-5510-000-0000-8100-000-000	NN			29.76	
PV-240459	11/15/2023	ACCT#376178		01-0000-0-5510-000-0000-8100-000-000	NN			3,130.35	
PV-240459	11/15/2023	ACCT#3192225		01-0000-0-5510-000-0000-8100-000-000	NN			977.46	
PV-240459	11/15/2023	ACCT#376672		01-0000-0-5510-000-0000-8100-000-000	NN			2,968.82	
PV-240459	11/15/2023	ACCT#376224		01-0000-0-5510-000-0000-8100-000-000	NN			320.91	
PV-240459	11/15/2023	ACCT#376786		01-0000-0-5510-000-0000-8100-000-000	NN			104.51	
PV-240459	11/15/2023	ACCT#376682		01-0000-0-5510-000-0000-8100-000-000	NN			446.47	
		TOTAL PAYMENT AMOUNT		8,021.01 *				8,021.01	
013858/00	SPURR								
PV-240461	11/15/2023	INV#133707 OCT GAS		01-0000-0-5515-000-0000-8100-000-000	NN			1,235.29	
		TOTAL PAYMENT AMOUNT		1,235.29 *				1,235.29	
015854/00	THE GENESIS GROUP	834326065							
PV-240490	11/16/2023	INV#23296017 COTA		01-6500-0-5800-000-5770-1190-000-000	NN			2,920.00	
PV-240490	11/16/2023	INV#23310022 COTA		01-6500-0-5800-000-5770-1190-000-000	NN			1,752.00	
		TOTAL PAYMENT AMOUNT		4,672.00 *				4,672.00	
014873/00	TPX COMMUNICATIONS								
PV-240452	11/15/2023	INV#175426746-0 LNG DIST PHONE		01-0000-0-5910-000-0000-7200-000-000	NN			2,954.76	
		TOTAL PAYMENT AMOUNT		2,954.76 *				2,954.76	
010906/00	WASTE MANAGEMENT	000000000							
PV-240463	11/15/2023	DHS WASTE		01-0000-0-5525-000-0000-8100-000-000	NN			1,058.17	
PV-240463	11/15/2023	DHW WASTE		01-0000-0-5525-000-0000-8100-000-000	NN			1,039.16	
PV-240463	11/15/2023	DHS WASTE		01-0000-0-5525-000-0000-8100-000-000	NN			1,111.07	
		TOTAL PAYMENT AMOUNT		3,208.40 *				3,208.40	

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn Op1 Op2	T9MPS	Liq Amt	Net Amount

014450/00	WIZIX	822534390						
PV-240479	11/15/2023	INV#365558 WG			01-0000-0-5840-214-1110-1000-000-000	NN		348.19
PV-240479	11/15/2023	INV#367103 MAINT			01-0000-0-5840-000-0000-7200-000-000	NN		27.55
PV-240479	11/15/2023	INV#36559 F5			01-9328-0-5840-000-0001-3900-000-524	NN		129.11
PV-240479	11/15/2023	INV#365854 DIST OFF			01-0000-0-5840-000-0000-7200-000-000	NN		68.91
PV-240479	11/15/2023	INV#365855 DHS			01-0000-0-5840-311-1110-1000-000-000	NN		1,028.04
PV-240479	11/15/2023	INV#365856 CMS			01-0000-0-5840-210-1110-1000-000-000	NN		16.36
TOTAL PAYMENT AMOUNT								1,618.16 *

015737/00	YOLO COUNTY EH							
PV-240478	11/15/2023	ACCT#1309			01-0000-0-5800-311-0000-8100-000-000	NN		2,045.00
PV-240478	11/15/2023	ACCT#2629			01-0000-0-5800-210-0000-8100-000-000	NN		1,882.00
TOTAL PAYMENT AMOUNT								3,927.00 *

001439/00	YOLO SOLANO AIR QUALITY	900833440						
PV-240454	11/15/2023	INV#14666 ANNUAL RENEWAL			01-0720-0-5800-000-0000-3600-000-000	NN		541.00
TOTAL PAYMENT AMOUNT								541.00 *

TOTAL Fund PAYMENT								310,444.40 **
								310,444.40

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
013858/00	SPURR								
PV-240461	11/15/2023	INV#133707 OCT GAS			13-5310-0-5515-000-0000-8100-000-000	NN			30.55
		TOTAL PAYMENT AMOUNT							30.55
		TOTAL Fund	PAYMENT						30.55
		TOTAL BATCH PAYMENT			310,474.95	***	0.00		310,474.95

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
015732/00	CERVANTES, CLAUDIA								
PV-240485	11/16/2023	OCT MILEAGE		01-6500-0-5230-000-5770-3600-000-000	NN				346.63
		TOTAL PAYMENT AMOUNT							346.63 *
015849/00	CHRISTIANSON-TREAT, TRICIA								
PV-240489	11/16/2023	CONF MILEAGE REIMB		01-0000-0-5200-107-0000-2100-000-000	NN				69.43
		TOTAL PAYMENT AMOUNT							69.43 *
015164/00	DELAROSA, SUSAN								
PV-240481	11/16/2023	ATTNDNCE REIMB		01-0000-0-4300-000-1110-1000-001-222	NN				246.96
		TOTAL PAYMENT AMOUNT							246.96 *
015670/00	ESPARZA, ANNA								
PV-240484	11/16/2023	SEPT MILEAGE		01-0000-0-5200-000-0000-2700-000-311	NN				141.48
		TOTAL PAYMENT AMOUNT							141.48 *
015699/00	GORBENKO, VADIM								
PV-240488	11/16/2023	OCT MILEAGE		01-6762-0-5230-107-1520-1000-000-000	NN				237.83
		TOTAL PAYMENT AMOUNT							237.83 *
015871/00	NIITANI, TIFFANY								
PV-240480	11/16/2023	RED RIBBON REIMB		01-1100-0-4300-000-1110-1000-000-223	NN				17.37
PV-240480	11/16/2023	ELD REIMB		01-1100-0-4300-000-1110-1000-000-223	NN				124.76
PV-240480	11/16/2023	LDRSHP REIMB		01-1100-0-4300-000-1110-1000-000-223	NN				32.25
		TOTAL PAYMENT AMOUNT							174.38 *
014784/00	ROMAN, ANA	000000000							
PV-240483	11/16/2023	OCT MILEAGE		01-6500-0-5230-000-5001-3120-000-000	NN				71.85
		TOTAL PAYMENT AMOUNT							71.85 *

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount

015572/00	SERNA, CECILIA								
PV-240486	11/16/2023	PARENT DRIVER MILEAGE OCT		01-6500-0-5890-000-5750-3600-000-000	NN				495.18
		TOTAL PAYMENT AMOUNT							495.18
									495.18 *
015762/00	TERE HAM								
PV-240482	11/16/2023	PARENT RIVER REIMB		01-6500-0-5890-000-5750-3600-000-000	NN				151.82
		TOTAL PAYMENT AMOUNT							151.82
									151.82 *
013261/00	VIELHAUER, NANCY								
PV-240487	11/16/2023	CONF TRAVEL MILEAGE		01-0000-0-5230-107-0000-2100-000-000	NN				217.94
PV-240487	11/16/2023	CONF TRAVEL MILEAGE		01-0000-0-5230-107-0000-2100-000-000	NN				55.15
PV-240487	11/16/2023	CONF TRAVEL MILEAGE		01-0000-0-5230-107-0000-2100-000-000	NN				52.14
		TOTAL PAYMENT AMOUNT							325.23
									325.23 *
		TOTAL Fund	PAYMENT						2,260.79
									2,260.79 **
		TOTAL BATCH PAYMENT						0.00	2,260.79
									2,260.79 ***

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef		
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount	

014367/00	BANK OF AMERICA									
PV-240498	11/16/2023	FASTRAK		01-8150-0-5800-000-0000-8110-000-000	NN				48.00	
PV-240498	11/16/2023	FASTRAK		01-8150-0-5800-000-0000-8110-000-000	NN				24.00	
PV-240498	11/16/2023	FASTRAK		01-8150-0-5800-000-0000-8110-000-000	NN				14.00	
PV-240498	11/16/2023	L.R. WEBINAR		01-7029-0-5200-000-0000-3700-000-000	NN				299.00	
PV-240498	11/16/2023	BUS. OFF. SOUTHWEST		01-0000-0-5200-000-0000-7300-000-000	NN				2,051.85	
PV-240498	11/16/2023	C.A. SOUTHWEST		01-0000-0-5200-000-0000-7400-000-000	NN				421.96	
PV-240498	11/16/2023	K.A. WEBINAR		01-0000-0-5200-000-0000-7300-000-000	NN				275.00	
PV-240498	11/16/2023	ZOOM		01-0000-0-5882-000-0000-7200-000-000	NN				79.00	
PV-240498	11/16/2023	BATES GREENHOUSE		01-9305-0-4400-000-1110-1000-000-213	NN				6,329.36	
PV-240498	11/16/2023	FINANCE CHARGE		01-0000-0-5800-000-0000-7200-000-000	NN				415.40	
PV-240498	11/16/2023	DHW MATERIALS		01-6053-0-4300-107-1110-1000-000-000	NN				2,788.27	
PV-240498	11/16/2023	RENAISSANCE HOTLE		01-0000-0-5200-000-0000-7300-000-000	NN				267.24	
TOTAL PAYMENT AMOUNT				13,013.08		*		13,013.08		
TOTAL Fund				PAYMENT		13,013.08		**		13,013.08
TOTAL BATCH PAYMENT				13,013.08		***		0.00		13,013.08

BATCH: 0110 EFT

<< Closed >>

Fund : 01 GENERAL FUND

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
012586/00	BAY ALARM COMPANY	941493317	92 FIS/GLOBAL vCard						
PV-240443	11/15/2023	INV#20897065 WGE		01-0000-0-5540-214-0000-8300-000-000	NN			135.00	
PV-240443	11/15/2023	INV#20903229 WGE		01-0000-0-5540-214-0000-8300-000-000	NN			169.26	
PV-240443	11/15/2023	INV#20905652 WGE		01-0000-0-5540-214-0000-8300-000-000	NN			227.25	
PV-240444	11/15/2023	INV#20948163 DIST OFF		01-0000-0-5540-000-0000-8300-000-000	NN			142.83	
PV-240444	11/15/2023	INV#20884771 DIST OFF		01-0000-0-5540-000-0000-8300-000-000	NN			64.05	
PV-240444	11/15/2023	INV#20915611 DIST OFF		01-0000-0-5540-000-0000-8300-000-000	NN			109.76	
PV-240444	11/15/2023	INV#20921971 DIST OFF		01-0000-0-5540-000-0000-8300-000-000	NN			67.85	
PV-240444	11/15/2023	INV#20912404 DIST OFF		01-0000-0-5540-000-0000-8300-000-000	NN			106.75	
PV-240444	11/15/2023	INV#20897306 DIST OFF		01-0000-0-5540-000-0000-8300-000-000	NN			182.25	
PV-240445	11/15/2023	INV#20946279 ISLE		01-0000-0-5540-224-0000-8300-000-000	NN			142.83	
PV-240445	11/15/2023	INV#20888508 ISLE		01-0000-0-5540-224-0000-8300-000-000	NN			129.98	
PV-240445	11/15/2023	INV#20928807 ISLE		01-0000-0-5540-224-0000-8300-000-000	NN			383.00	
PV-240445	11/15/2023	INV#20903145 ISLE		01-0000-0-5540-224-0000-8300-000-000	NN			196.19	
PV-240446	11/15/2023	INV#20936289 BATES		01-0000-0-5540-213-0000-8300-000-000	NN			78.72	
PV-240446	11/15/2023	INV#20921338 BATES		01-0000-0-5540-213-0000-8300-000-000	NN			86.79	
PV-240446	11/15/2023	INV#20916618 BATES		01-0000-0-5540-213-0000-8300-000-000	NN			112.50	
PV-240446	11/15/2023	INV#20897567 BATES		01-0000-0-5540-213-0000-8300-000-000	NN			30.00	
PV-240447	11/15/2023	INV#20937962 MOKE		01-0000-0-5540-335-0000-8300-000-000	NN			66.16	
PV-240447	11/15/2023	INV#20933720 MOKE		01-0000-0-5540-335-0000-8300-000-000	NN			120.03	
PV-240447	11/15/2023	INV#20908141 MOKE		01-0000-0-5540-335-0000-8300-000-000	NN			146.00	
PV-240448	11/15/2023	INV#20923760 DHW		01-0000-0-5540-223-0000-8300-000-000	NN			109.00	
PV-240448	11/15/2023	INV#20916267 DHW		01-0000-0-5540-223-0000-8300-000-000	NN			250.96	
PV-240449	11/15/2023	INV#20889215 BS GRGE		01-0720-0-5540-000-0000-8300-000-000	NN			59.29	
PV-240449	11/15/2023	INV#20914065 BS GRGE		01-0720-0-5540-000-0000-8300-000-000	NN			132.25	
TOTAL PAYMENT AMOUNT				3,248.70 *				3,248.70	

015255/00	BUSLOOP	834345282	92 FIS/GLOBAL vCard					
PV-240492	11/16/2023	E#11102023RVE CHARTER BUS		01-0000-0-5895-321-1690-4200-000-000	NN			1,775.00
TOTAL PAYMENT AMOUNT				1,775.00 *				1,775.00

TOTAL Fund	CHECKS	0.00 **	0.00
TOTAL Fund	EFT	5,023.70 **	5,023.70
TOTAL Fund	PAYMENT	5,023.70 **	5,023.70

Payments from 11/17 had to be released By SCOE due to a power outage at the district office. EFT payments from this batch did not get released properly, they appear twice- once in this batch and once in the following batch dated 11/28. these are not duplicated payments.

BATCH: 0110 EFT

<< Closed >>

Fund : 12 CHILD DEVELOPMENT FUND

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
014177/00	COMMUNITY PLAYTHINGS	141803009	82 FIS/GLOBAL ACH						
240218	PO-240198	11/15/2023	INV#389Q-1 ISLE PRE SUPPL	1	12-6105-0-4300-000-0001-1000-891-000	NY	F	664.97	668.82
			TOTAL PAYMENT AMOUNT					668.82 *	668.82
			TOTAL Fund	CHECKS		0.00	**		0.00
			TOTAL Fund	EFT		668.82	**		668.82
			TOTAL Fund	PAYMENT		668.82	**		668.82

BATCH: 0110 EFT

<< Closed >>

Fund : 25 CAPITAL FACILITIES FUND

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
012528/00	WILLSCOT	520665775	92 FIS/GLOBAL vCard						
PV-240442	11/15/2023	INV#9019270739	RMS MODULAR	25-9010-0-5630-000-0000-8700-095-222	NN				1,404.30
PV-240442	11/15/2023	INV#9019270737	RMS MODULAR	25-9010-0-5630-000-0000-8700-095-222	NN				1,404.30
			TOTAL PAYMENT AMOUNT		2,808.60	*			2,808.60
			TOTAL Fund	CHECKS		0.00	**		0.00
			TOTAL Fund	EFT		2,808.60	**		2,808.60
			TOTAL Fund	PAYMENT		2,808.60	**		2,808.60
			TOTAL BATCH CHECKS			0.00	***	0.00	0.00
			TOTAL BATCH EFT			8,501.12	***	0.00	8,501.12
			TOTAL BATCH PAYMENT			8,501.12	***	0.00	8,501.12
			TOTAL DISTRICT CHECKS			645,160.25	****	0.00	645,160.25
			TOTAL DISTRICT EFT			14,838.62	****	0.00	14,838.62
			TOTAL DISTRICT PAYMENT			659,998.87	****	0.00	659,998.87
			TOTAL FOR ALL DISTRICTS CHK:			645,160.25	****	0.00	645,160.25
			TOTAL FOR ALL DISTRICTS EFT:			14,838.62	****	0.00	14,838.62
			TOTAL FOR ALL DISTRICTS:			659,998.87	****	0.00	659,998.87
Number of checks to be printed:			82,	not counting voids due to stub overflows.					645,160.25
Number of EFT generated:			6						14,838.62

Batch status: A All

From batch: 0110

To batch: 0114

Include Revolving Cash: Y

Include Address: N

Include Object Desc: N

Include Vendor TIN: Y

BATCH: 0110 EFT

<< Open >>

Fund : 01 GENERAL FUND

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef
Req Reference	Date	Description	Fd Resc Y	Objt Ste Goal	Fctn Op1 Op2	T9MPS	Liq Amt	Net Amount

012586/00	BAY ALARM COMPANY	941493317	92 FIS/GLOBAL vCard					
PV-240443	11/15/2023	INV#20897065	WGE	01-0000-0-5540-214-0000-8300-000-000	NN			135.00
PV-240443	11/15/2023	INV#20903229	WGE	01-0000-0-5540-214-0000-8300-000-000	NN			169.26
PV-240443	11/15/2023	INV#20905652	WGE	01-0000-0-5540-214-0000-8300-000-000	NN			227.25
PV-240444	11/15/2023	INV#20948163	DIST OFF	01-0000-0-5540-000-0000-8300-000-000	NN			142.83
PV-240444	11/15/2023	INV#20884771	DIST OFF	01-0000-0-5540-000-0000-8300-000-000	NN			64.05
PV-240444	11/15/2023	INV#20915611	DIST OFF	01-0000-0-5540-000-0000-8300-000-000	NN			109.76
PV-240444	11/15/2023	INV#20921971	DIST OFF	01-0000-0-5540-000-0000-8300-000-000	NN			67.85
PV-240444	11/15/2023	INV#20912404	DIST OFF	01-0000-0-5540-000-0000-8300-000-000	NN			106.75
PV-240444	11/15/2023	INV#20897306	DIST OFF	01-0000-0-5540-000-0000-8300-000-000	NN			182.25
PV-240445	11/15/2023	INV#20946279	ISLE	01-0000-0-5540-224-0000-8300-000-000	NN			142.83
PV-240445	11/15/2023	INV#20888508	ISLE	01-0000-0-5540-224-0000-8300-000-000	NN			129.98
PV-240445	11/15/2023	INV#20928807	ISLE	01-0000-0-5540-224-0000-8300-000-000	NN			383.00
PV-240445	11/15/2023	INV#20903145	ISLE	01-0000-0-5540-224-0000-8300-000-000	NN			196.19
PV-240446	11/15/2023	INV#20936289	BATES	01-0000-0-5540-213-0000-8300-000-000	NN			78.72
PV-240446	11/15/2023	INV#20921338	BATES	01-0000-0-5540-213-0000-8300-000-000	NN			86.79
PV-240446	11/15/2023	INV#20916618	BATES	01-0000-0-5540-213-0000-8300-000-000	NN			112.50
PV-240446	11/15/2023	INV#20897567	BATES	01-0000-0-5540-213-0000-8300-000-000	NN			30.00
PV-240447	11/15/2023	INV#20937962	MOKE	01-0000-0-5540-335-0000-8300-000-000	NN			66.16
PV-240447	11/15/2023	INV#20933720	MOKE	01-0000-0-5540-335-0000-8300-000-000	NN			120.03
PV-240447	11/15/2023	INV#20908141	MOKE	01-0000-0-5540-335-0000-8300-000-000	NN			146.00
PV-240448	11/15/2023	INV#20923760	DHW	01-0000-0-5540-223-0000-8300-000-000	NN			109.00
PV-240448	11/15/2023	INV#20916267	DHW	01-0000-0-5540-223-0000-8300-000-000	NN			250.96
PV-240449	11/15/2023	INV#20889215	BS GRGE	01-0720-0-5540-000-0000-8300-000-000	NN			59.29
PV-240449	11/15/2023	INV#20914065	BS GRGE	01-0720-0-5540-000-0000-8300-000-000	NN			132.25
TOTAL PAYMENT AMOUNT								3,248.70 *

015255/00	BUSLOOP	834345282	92 FIS/GLOBAL vCard					
PV-240492	11/16/2023	E#11102023RVE	CHARTER BUS	01-0000-0-5895-321-1690-4200-000-000	NN			1,775.00
TOTAL PAYMENT AMOUNT								1,775.00 *

TOTAL Fund	CHECKS	0.00	**	0.00
TOTAL Fund	EFT	5,023.70	**	5,023.70
TOTAL Fund	PAYMENT	5,023.70	**	5,023.70

BATCH: 0110 EFT

<< Open >>

Fund : 12 CHILD DEVELOPMENT FUND

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef		
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount	
014177/00	COMMUNITY PLAYTHINGS	141803009	82 FIS/GLOBAL ACH							
240013	PO-240102 11/28/2023	inv#w22lm-1 pre chairs	1	12-6105-0-4400-000-0001-1000-891-000	NY F			1,903.00	1,914.00	
240218	PO-240198 11/15/2023	INV#389Q-1 ISLE PRE SUPPL	1	12-6105-0-4300-000-0001-1000-891-000	NY F			664.97	668.82	
		TOTAL PAYMENT AMOUNT							2,582.82	
		TOTAL Fund	CHECKS					0.00	**	0.00
		TOTAL Fund	EFT					2,582.82	**	2,582.82
		TOTAL Fund	PAYMENT					2,582.82	**	2,582.82

BATCH: 0110 EFT

<< Open >>

Fund : 25 CAPITAL FACILITIES FUND

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
012528/00	WILLSCOT	520665775	92 FIS/GLOBAL vCard						
PV-240442	11/15/2023	INV#9019270739	RMS MODULAR	25-9010-0-5630-000-0000-8700-095-222	NN				1,404.30
PV-240442	11/15/2023	INV#9019270737	RMS MODULAR	25-9010-0-5630-000-0000-8700-095-222	NN				1,404.30
			TOTAL PAYMENT AMOUNT		2,808.60	*			2,808.60
			TOTAL Fund	CHECKS		0.00	**		0.00
			TOTAL Fund	EFT		2,808.60	**		2,808.60
			TOTAL Fund	PAYMENT		2,808.60	**		2,808.60
			TOTAL BATCH CHECKS			0.00	***	0.00	0.00
			TOTAL BATCH EFT			10,415.12	***	0.00	10,415.12
			TOTAL BATCH PAYMENT			10,415.12	***	0.00	10,415.12

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
015007/00	AMS.NET	943291626							
PO-230336	11/28/2023	INV30071709 RVHS ERATE	1	01-0000-0-6500-000-9172-7200-000-000	NN F			945.20	1,191.89
		TOTAL PAYMENT AMOUNT							1,191.89
013347/00	CASBO PROFESSIONAL DEVELOPMENT	946082654							
240349	PO-240327	11/28/2023	K.S. CASBBO WORKSHOP REGIST	1	01-0000-0-5200-000-0000-7300-000-000	NN F		305.00	305.00
		TOTAL PAYMENT AMOUNT							305.00
013876/00	DATA PATH	900242296							
240147	PO-240118	11/28/2023	INV#167381 DELL VRTX RENEWAL 1	1	01-0000-0-5800-000-9670-7200-000-000	NN F		1,938.00	2,369.75
		TOTAL PAYMENT AMOUNT							2,369.75
		TOTAL Fund	PAYMENT						3,866.64
		TOTAL BATCH PAYMENT						0.00	3,866.64

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount

015876/00	CalSTRS								
PV-240509	11/28/2023	INV#938011988359	A. CAGE	01-0000-0-1100-214-1110-1000-000-000	NN				6,334.40
			TOTAL PAYMENT AMOUNT						6,334.40
									6,334.40 *
013876/00	DATA PATH	900242296							
PV-240506	11/28/2023	INV#166095	PROJ#1631 365 MIG.	01-0000-0-5800-000-0000-7700-000-000	NN				4,000.00
PV-240506	11/28/2023	INV#166094	PROJ#1631 365 MIG.	01-0000-0-5800-000-0000-7700-000-000	NN				4,000.00
PV-240506	11/28/2023	INV#166458DP	ERATE	01-0000-0-6500-000-9172-7200-000-000	NN				82,263.51
PV-240506	11/28/2023	INV3166841	22 WINDOWS SRVR	01-0000-0-5882-000-1110-1000-000-000	NN				801.00
PV-240507	11/28/2023	INV#167206	NOV MONTHLY	01-0000-0-5800-000-9670-7200-000-000	NN				14,291.26
PV-240507	11/28/2023	INV#166595	OCT MONTHLY	01-0000-0-5800-000-9670-7200-000-000	NN				14,267.09
			TOTAL PAYMENT AMOUNT						119,622.86
									119,622.86 *
015659/00	EDWARDS, STEVENS, AND TUCKER	814627833							
PV-240508	11/28/2023	INV#5261	PROF SRVCS	01-0000-0-5880-000-9200-7160-000-000	NY				1,519.00
PV-240508	11/28/2023	INV#5261	PROF SRVCS	01-0000-0-5880-000-0000-7150-000-000	NY				3,348.00
PV-240508	11/28/2023	INV#5261	PROF SRVCS	01-0000-0-5880-000-0000-7110-000-000	NY				2,759.00
			TOTAL PAYMENT AMOUNT						7,626.00
									7,626.00 *
			TOTAL Fund	PAYMENT					133,583.26
									133,583.26 **

BATCH: 0113 PAY VOUCHER

<< Open >>

Fund : 11 ADULT EDUCATION

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE	ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1	Op2	T9MPS	Liq Amt	Net Amount
013876/00	DATAPATH	900242296								
PV-240507	11/28/2023	INV#167206 NOV MONTHLY			11-6391-0-5800-000-4110-1000-000-000	NN				802.89
PV-240507	11/28/2023	INV#166595 OCT MONTHLY			11-6391-0-5800-000-4110-1000-000-000	NN				801.52
		TOTAL PAYMENT AMOUNT								1,604.41
		TOTAL Fund	PAYMENT							1,604.41
										1,604.41 **

BATCH: 0113 PAY VOUCHER

<< Open >>

Fund : 12 CHILD DEVELOPMENT FUND

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE	ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1	Op2	T9MPS	Liq Amt	Net Amount
013876/00	DATAPATH	900242296								
PV-240507	11/28/2023	INV#167206 NOV MONTHLY			12-6105-0-5800-000-0001-1000-891-000	NN				160.57
PV-240507	11/28/2023	INV#166595 OCT MONTHLY			12-6105-0-5800-000-0001-1000-891-000	NN				160.31
TOTAL PAYMENT AMOUNT					320.88	*				320.88
TOTAL Fund					PAYMENT	320.88	**			320.88

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
013876/00	DATAPATH	900242296							
PV-240507	11/28/2023	INV#167206 NOV MONTHLY		13-5310-0-5800-000-9670-3700-000-000	NN				802.87
PV-240507	11/28/2023	INV#166595 OCT MONTHLY		13-5310-0-5800-000-9670-3700-000-000	NN				801.52
		TOTAL PAYMENT AMOUNT							1,604.39
		TOTAL Fund	PAYMENT						1,604.39
		TOTAL BATCH PAYMENT							137,112.94

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
013692/00	PATIN, ANGELA	000000000							
	PV-240510	11/28/2023	OCT MILEAGE		01-0000-0-5230-107-0000-3140-000-000	NN			71.19
					TOTAL PAYMENT AMOUNT				71.19
									71.19 *
					TOTAL Fund	PAYMENT			71.19 **

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
015321/00	DRURY, CHANDRA								
PV-240511	11/28/2023	CONF REIMB			11-6391-0-5200-000-4110-2700-000-000	NN			62.35
					TOTAL PAYMENT AMOUNT				62.35
					TOTAL Fund	PAYMENT			62.35
					TOTAL BATCH PAYMENT			0.00	133.54
					TOTAL DISTRICT CHECKS			0.00	685,546.40
					TOTAL DISTRICT EFT			0.00	10,415.12
					TOTAL DISTRICT PAYMENT			0.00	695,961.52
					TOTAL FOR ALL DISTRICTS CHK:			0.00	685,546.40
					TOTAL FOR ALL DISTRICTS EFT:			0.00	10,415.12
					TOTAL FOR ALL DISTRICTS:			0.00	695,961.52
					Number of checks to be printed:				19, not counting voids due to stub overflows.
					Number of EFT generated:				4

Batch status: A All

From batch: 0115

To batch: 0121

Include Revolving Cash: Y

Include Address: N

Include Object Desc: N

Include Vendor TIN: Y

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef
Req Reference	Date	Description	Fd Resc Y	Objt Ste Goal	Fctn Opl Op2	T9MPS	Liq Amt	Net Amount
015430/00	Amazon Capital Services	820544687						
240083	PO-240062	11/29/2023	INV#1K47-7WKY-WDRF	TRANSPORT	1 01-0720-0-4300-000-0000-3600-000-000	NN P	49.32	49.32
240083	PO-240062	11/29/2023	INV#1RNV-MMJT-WV6R	TRANSPORT	1 01-0720-0-4300-000-0000-3600-000-000	NN P	7.56	7.56
240135	PO-240122	11/29/2023	INV#1K1T-W6NQ-XJLC	DHS SUPP	1 01-0740-0-4300-000-1110-1000-000-311	NN F	147.68	131.89
240135	PO-240122	11/29/2023	INV#1K1T-W6QN-XJLC	CMS SUPPL	2 01-0740-0-4300-000-1110-1000-000-210	NN F	147.70	131.88
240176	PO-240167	11/29/2023	INV#1H4R-YNFF-XCH6	RVHS SUPPL	1 01-0000-0-4300-000-1110-1000-000-321	NN F	310.55	322.22
240181	PO-240169	11/29/2023	INV#1K47-7WKY-WWFN	RVHS SUPPL	1 01-0000-0-4300-000-1110-1000-000-321	NN F	416.56	420.72
240213	PO-240189	11/29/2023	INV#1LL9-NLDC-XHL3	DHS SUPPL	1 01-0000-0-4300-000-1110-1000-000-311	NN F	240.04	240.78
240213	PO-240189	11/29/2023	INV#1LL9-NLDC-XHL3	CMS SUPPL	2 01-0000-0-4300-000-1110-1000-000-210	NN F	240.04	240.77
240198	PO-240196	11/29/2023	INV#1H7Y-YD9J-XPFM	ISLE PRE	1 01-0000-0-4300-000-1110-1000-000-224	NN F	182.43	178.94
240227	PO-240205	11/29/2023	INV#13JD-L914-W394	ISLE SUPPL	1 01-0000-0-4300-000-1110-1000-000-224	NN F	131.93	122.03
240233	PO-240210	11/29/2023	INV#1MLP-X3X6-1KFD	DHW SUPPL	1 01-0000-0-4300-000-1110-1000-000-223	NN F	392.09	374.65
240247	PO-240220	11/29/2023	INV#1KLX-7MHF-XTMK	SPED SUPPL	1 01-6500-0-4300-000-5770-1120-000-000	NN F	45.38	45.39
240257	PO-240236	11/29/2023	INV#1JDL-YCGR-7DK3	BATES SUPPL	1 01-0000-0-4300-000-1110-1000-000-213	NN F	164.18	177.79
240265	PO-240239	11/30/2023	INV#13WV-X3RG-WJM3	UPSTAIRS	1 01-0000-0-4300-107-0000-2100-000-000	NN F	336.26	452.31
240268	PO-240241	11/29/2023	INV#16RT-XG4R-3JJK	ED SRVCS	1 01-0000-0-4300-107-0000-2100-000-000	NN F	36.75	36.75
240277	PO-240249	11/29/2023	INV#1MC9-NFWY-YMF9	ED SUPPL	1 01-6500-0-4100-000-5770-1120-000-000	NN F	148.13	148.15
240279	PO-240251	11/29/2023	INV#1CNW-YX3K-YQFL	BATES SUPPL	1 01-0000-0-4300-000-1110-1000-000-213	NN F	20.32	20.03
240249	PO-240252	11/29/2023	INV#113Q-3DTQ-6HJK	ISLE SUPPL	1 01-0000-0-4300-000-1110-1000-000-224	NN F	820.20	596.00
240276	PO-240254	11/29/2023	INV#1V3C-1XCH-6WG1	ISLE SUPPL	1 01-0000-0-4300-000-1110-1000-000-224	NN F	122.20	118.45
240280	PO-240260	11/29/2023	INV#16RT-HQ4R-3VY9	RVHS SUPPL	1 01-0000-0-4300-000-1110-1000-000-321	NN F	121.38	124.43
240288	PO-240265	11/29/2023	INV#1VRK-XMQT-WQDP	SPED SUPPL	1 01-6500-0-4300-000-5770-1120-000-000	NN F	36.75	43.18
240294	PO-240267	11/30/2023	INV#1QGT-9GWW-XK3V	SPED SUPPL	1 01-6500-0-4300-000-5770-1120-000-000	NN F	9.72	9.61
240299	PO-240272	11/29/2023	INV#1NKN-CYLN-37GK	BATES SUPPL	1 01-0000-0-4300-000-1110-1000-000-213	NN F	14.05	14.00
240336	PO-240305	11/29/2023	INV#1KF7-6434-7T3Y	RVHS SUPPL	1 01-6387-0-4300-000-1110-1000-826-000	NN F	156.73	156.82
240340	PO-240309	11/29/2023	INV#1WTR-CP1P-39D3	TOSA	1 01-6266-0-4300-000-1110-1000-000-000	NN F	69.65	102.55
240363	PO-240325	11/29/2023	INV#1G6C-YNFT-7W6N	DHW SUPPL	1 01-0740-0-4300-000-1110-1000-000-223	NN F	134.29	135.16
240364	PO-240326	11/29/2023	INV#11PJ-MJCM-C44P	RMS SUPPL	1 01-0000-0-4300-000-1110-1000-001-222	NN F	325.94	325.98
240394	PO-240351	11/30/2023	INV#1NKN-CYLN-4X4C	RMS	1 01-1100-0-4300-000-1110-1000-000-222	NN F	111.15	83.50
240394	PO-240351	11/30/2023	INV#1NKN-CYLN-4X4C	RMS	2 01-0740-0-4300-000-1110-1000-000-222	NN F	74.12	55.66
	PV-240512	11/29/2023	INV#19YT-MG63-1JMK		01-0000-0-4300-000-0000-8100-000-000	NN		935.52
	PV-240512	11/29/2023	INV#19YT-MG63-1JMK		01-0720-0-4400-000-0000-3600-000-000	NN		592.80
	PV-240512	11/29/2023	INV#19YT-MG63-1JMK		01-0720-0-4300-000-0000-3600-000-000	NN		119.98
	PV-240512	11/29/2023	INV#19YT-MG63-1JMK		01-8150-0-4300-000-0000-8110-000-000	NN		4,318.13
	PV-240513	11/29/2023	INV#1JNL-6JFL-83P7		01-0720-0-4300-000-0000-3600-000-000	NN		220.92
	PV-240513	11/29/2023	INV#1JNL-6JFL-83P7		01-0000-0-4300-000-0000-8100-000-000	NN		179.82
	PV-240513	11/29/2023	INV#1JNL-6JFL-83P7		01-0000-0-4300-000-0000-8200-000-000	NN		133.56
	PV-240513	11/29/2023	INV#1JNL-6JFL-83P7		01-8150-0-4300-000-0000-8110-000-000	NN		2,937.64
	PV-240524	11/30/2023	INV#113N-WKP3-NP1N	WGE	01-0000-1-4300-000-1110-1000-001-214	NN		7,635.56
	PV-240524	11/30/2023	INV#1M9T-WPCK-J9NF	WGE	01-0000-1-4300-000-1110-1000-001-214	NN		3,751.85
	PV-240524	11/30/2023	INV#1GWC-D1K4-NG6Y	RVHS	01-0000-0-4300-000-1110-1000-000-321	NN		10.37
			TOTAL PAYMENT AMOUNT		25,702.67 *			25,702.67
			TOTAL Fund	PAYMENT	25,702.67 **			25,702.67

BATCH: 0115 AMAZON

<< Open >>

Fund : 12 CHILD DEVELOPMENT FUND

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
015430/00	Amazon Capital Services	820544687							
240228	PO-240206	11/29/2023	INV#16GT-Q4GY-1RQR	ISLE PRE	1	12-6105-0-4300-000-0001-1000-891-000	NN F	285.51	264.03
240315	PO-240292	11/29/2023	INV#1FN9-C7GY-6YD1	ISLE PRE	1	12-6105-0-4300-000-0001-1000-891-000	NN F	296.19	297.44
240333	PO-240304	11/29/2023	INV#1XWM-GN93-66JM	ISLE PRE	1	12-6105-0-4300-000-0001-1000-891-000	NN F	299.59	336.75
TOTAL PAYMENT AMOUNT						898.22 *			898.22
TOTAL Fund					PAYMENT		898.22 **		898.22
TOTAL BATCH PAYMENT						26,600.89 ***	0.00		26,600.89

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef			
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount		

014428/00	CENTRAL REGION CATA										
240397	PO-240354	11/29/2023	INV#269	FALL	REGIST	1	01-7010-0-5200-000-1215-1000-800-311	NN F	30.00	30.00	
240397	PO-240354	11/29/2023	INV#269	FALL	REGIST	2	01-0000-0-5200-000-1215-1000-800-311	NN F	30.00	30.00	
TOTAL PAYMENT AMOUNT									60.00 *	60.00	
012111/00	CRISIS PREVENTION INSTITUTE 000000000										
240393	PO-240367	11/29/2023	INV#NAIN-041887	CPI	TRAINING	1	01-6266-0-5200-107-1110-1000-000-000	NN F	3,349.00	3,349.00	
TOTAL PAYMENT AMOUNT									3,349.00 *	3,349.00	
014935/00	HOME CAMPUS 470979891										
240090	PO-240076	11/30/2023	INV#HC-5230	RVHS		1	01-0000-0-5882-321-1690-4200-000-000	NN F	1,075.85	995.00	
240090	PO-240076	11/30/2023	INV#HC-5230	DHS		2	01-0000-0-5882-311-1690-4200-000-000	NN F	1,075.84	995.00	
TOTAL PAYMENT AMOUNT									1,990.00 *	1,990.00	
014955/00	JOHNSON CONTRLS 390380010										
240312	PO-240284	11/29/2023	INV#51379731	DHW	ALARM	1	01-8150-0-5800-000-0000-8110-000-000	NN F	5,536.00	5,195.22	
TOTAL PAYMENT AMOUNT									5,195.22 *	5,195.22	
TOTAL Fund PAYMENT									10,594.22 **	10,594.22	
TOTAL BATCH PAYMENT									10,594.22 ***	0.00	10,594.22

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn Op1 Op2 T9MPS	Liq Amt	Net	Amount
012497/00	BUSWEST	270746875						
240099	PO-240081 11/29/2023	INV#XA410046246:01	BUS PARTS	1	01-0720-0-4300-000-0000-3600-000-000	NN P	254.59	254.59
			TOTAL PAYMENT AMOUNT		254.59 *			254.59
014242/00	CAMACHO MECHANICAL	271604281						
240300	PO-240273 11/29/2023	INV#8865	SHIPPING	1	01-8150-0-5800-000-0000-8110-000-000	NY P	32.00	32.00
240300	PO-240273 11/29/2023	INV#8865	SUPPLIES	2	01-8150-0-4300-000-0000-8110-000-000	NY F	688.13	749.54
			TOTAL PAYMENT AMOUNT		781.54 *			781.54
013798/00	CROWE LLP	350921680						
	PO-230613 11/30/2023	INV#745-2715047	FY 22-23 AUDIT	1	01-0000-0-5800-000-0000-7300-000-000	N7 P	22,250.00	22,250.00
			TOTAL PAYMENT AMOUNT		22,250.00 *			22,250.00
013876/00	DATA PATH	900242296						
240088	PO-240074 11/30/2023	INV#167695DP	RDUSD JAMF	1	01-0000-0-5800-000-0000-7200-000-000	NN P	1,500.00	1,500.00
			TOTAL PAYMENT AMOUNT		1,500.00 *			1,500.00
013913/00	FLORAL FRESH	680095675						
240208	PO-240184 11/29/2023	INV#1352643	FLORAL SUPPL	3	01-0000-0-4300-000-1215-1000-800-311	NN P	122.41	122.41
240208	PO-240184 11/29/2023	INV#1352643	FLORAL SUPPL	4	01-7010-0-4300-000-1215-1000-800-311	NN P	122.41	122.41
			TOTAL PAYMENT AMOUNT		244.82 *			244.82
013912/00	FLORAL RESOURCES SACRAMENTO	455530476						
240209	PO-240185 11/29/2023	INV#1352641	FLORAL SUPPL	3	01-0000-0-4300-000-1215-1000-800-311	N7 P	5.71	5.71
240209	PO-240185 11/29/2023	INV#1352641	FLORAL SUPPL	4	01-7010-0-4300-000-1215-1000-800-311	N7 P	5.71	5.71
			TOTAL PAYMENT AMOUNT		11.42 *			11.42
000711/00	GROW WEST-PARTS	941561366						
240097	PO-240080 11/29/2023	10/6-10/24	TRANSPORT SUPPL	1	01-0720-0-4300-000-0000-3600-000-000	NN P	169.68	169.68
			TOTAL PAYMENT AMOUNT		169.68 *			169.68

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
013947/00	HOME DEPOT PRO	222232386	92 FIS/GLOBAL vCard						
240400	PO-240357	11/30/2023	INV#771396207	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	29.52	29.52
240400	PO-240357	11/30/2023	INV#768083610	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	74.13	74.13
240400	PO-240357	11/30/2023	INV#768822165	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	113.92	113.92
240400	PO-240357	11/30/2023	INV#769068784	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	31.27	31.27
240400	PO-240357	11/30/2023	INV#770919876	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	125.08	125.08
240400	PO-240357	11/30/2023	INV#771164290	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	57.72	57.72
240400	PO-240357	11/30/2023	INV#770996809	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	324.12	324.12
240400	PO-240357	11/30/2023	INV#770996791	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	62.54	62.54
240400	PO-240357	11/30/2023	INV#770995314	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	1,258.51	1,258.51
240400	PO-240357	11/30/2023	INV#766924344	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	125.08	125.08
240400	PO-240357	11/30/2023	INV#767148520	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	169.63	169.63
240400	PO-240357	11/30/2023	INV#767374721	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	895.97	895.97
240400	PO-240357	11/30/2023	INV#767633381	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	19.20	19.20
240400	PO-240357	11/30/2023	INV#766924336	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	180.76	180.76
240400	PO-240357	11/30/2023	INV#773194865	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	208.52	208.52
240400	PO-240357	11/30/2023	INV#773033725	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	1,102.02	1,102.02
240400	PO-240357	11/30/2023	INV#773194873	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	57.41	57.41
240400	PO-240357	11/30/2023	INV#773026695	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	1,712.18	1,712.18
240400	PO-240357	11/30/2023	INV#773026687	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	159.32	159.32
240400	PO-240357	11/30/2023	INV#772309266	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	29.58	29.58
240400	PO-240357	11/30/2023	INV#772367066	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	1,119.84	1,119.84
240400	PO-240357	11/30/2023	INV#772544623	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	139.22	139.22
240400	PO-240357	11/30/2023	INV#772544631	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	92.04	92.04
240400	PO-240357	11/30/2023	INV#773486865	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	253.63	253.63
240400	PO-240357	11/30/2023	INV#773486857	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	279.97	279.97
240400	PO-240357	11/30/2023	INV#773915582	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	30.97	30.97
240400	PO-240357	11/30/2023	INV#773985213	CUSTODIAL SUPPL	1	01-0000-0-4300-000-0000-8200-000-000	NN P	1,470.26	1,470.26
			TOTAL PAYMENT AMOUNT			10,122.41 *			10,122.41
014824/00	J & D WHOLESALE	000000000							
240285	PO-240263	11/29/2023	INV#06305350	FLORAL SUPPL	1	01-0000-0-4300-000-1215-1000-800-321	NN P	273.75	273.75
240285	PO-240263	11/29/2023	INV#06305350	FLORAL SUPPL	2	01-7010-0-4300-000-1215-1000-800-321	NN P	273.75	273.75
			TOTAL PAYMENT AMOUNT			547.50 *			547.50
013554/00	POINT QUEST EDUCATION	834685360							
240165	PO-240149	11/29/2023	INV#740495	NPS SRVCS	1	01-6500-0-5100-000-5750-1180-000-000	NN P	11,581.00	11,581.00
240165	PO-240149	11/29/2023	INV#540391	NPS SRVCS	1	01-6500-0-5100-000-5750-1180-000-000	NN P	937.50	937.50
240165	PO-240149	11/29/2023	INV#540374	NPS SRVCS	1	01-6500-0-5100-000-5750-1180-000-000	NN P	22,849.00	22,849.00
240165	PO-240149	11/29/2023	INV#540401	NPS SRVCS	1	01-6500-0-5100-000-5750-1180-000-000	NN P	500.00	500.00
240165	PO-240149	11/29/2023	INV#540415	NPS SRVCS	1	01-6500-0-5100-000-5750-1180-000-000	NN P	5,473.50	5,473.50
240165	PO-240149	11/30/2023	INV#540401	NPS SRVCS	1	01-6500-0-5100-000-5750-1180-000-000	NN P	500.00	500.00

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
TOTAL PAYMENT AMOUNT				41,841.00	*			41,841.00	
014333/00	PROCARE THERAPY	261251927							
240296	PO-240269	11/29/2023	INV#20810854	PARAPROFESS.	1	01-6500-0-5100-000-5750-1190-000-000	NN P	1,800.00	1,800.00
TOTAL PAYMENT AMOUNT				1,800.00	*			1,800.00	
000193/00	RIO VISTA ACE HARDWARE	941544584							
240040	PO-240023	11/30/2023	10/3-10/30	MO SUPPL	1	01-8150-0-4300-000-0000-8110-000-000	NN P	635.54	635.54
TOTAL PAYMENT AMOUNT				635.54	*			635.54	
013540/00	SOLIANT HEALTH	000000000							
240270	PO-240243	11/29/2023	INV#20812097	BCBA	1	01-6500-0-5800-000-5770-1190-000-000	NN P	13,335.00	13,335.00
TOTAL PAYMENT AMOUNT				13,335.00	*			13,335.00	
TOTAL Fund			CHECKS	83,371.09	**			83,371.09	
TOTAL Fund			EFT	10,122.41	**			10,122.41	
TOTAL Fund			PAYMENT	93,493.50	**			93,493.50	

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
013798/00	CROWE LLP	350921680							
PO-230630	11/30/2023	INV#745-2715047	MEAJ J	1	22-9359-0-5815-000-0000-8200-000-000	N7 P		1,500.00	1,500.00
			TOTAL PAYMENT AMOUNT					1,500.00 *	1,500.00
			TOTAL Fund	PAYMENT				1,500.00 **	1,500.00

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
013798/00	CROWE LLP	350921680							
PO-230630	11/30/2023	INV#745-2715047	MEAS K	2	23-9360-0-5815-000-0000-8200-000-000	N7	P	1,500.00	1,500.00
			TOTAL PAYMENT AMOUNT					1,500.00 *	1,500.00
			TOTAL Fund	PAYMENT				1,500.00 **	1,500.00
			TOTAL BATCH CHECKS		86,371.09	***		0.00	86,371.09
			TOTAL BATCH EFT		10,122.41	***		0.00	10,122.41
			TOTAL BATCH PAYMENT		96,493.50	***		0.00	96,493.50

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn Op1 Op2	T9MPS	Liq Amt	Net Amount

015877/00	ACSA							
	PV-240527	11/30/2023	TAMMY BUSCH	ACSA MEMBERSHIP	01-0000-0-5300-000-0000-7300-000-000	NN		1,446.50
				TOTAL PAYMENT AMOUNT		1,446.50 *		1,446.50
012964/00	ASSOCIATED VALUATION SERVICES	264145330						
	PV-240537	11/30/2023	INV#7413	FIXED ASSET 1	01-0000-0-5800-000-0000-7200-000-000	NN		6,078.00
				TOTAL PAYMENT AMOUNT		6,078.00 *		6,078.00
001498/00	EMPLOYEMENT DEVELOPMENT DEPT.							
	PV-240535	11/30/2023	L1666340432	LIABILITY FEES	01-0000-0-3502-000-0000-7200-000-000	NN		439.80
				TOTAL PAYMENT AMOUNT		439.80 *		439.80
015671/00	GEOLINKS							
	PV-240536	11/30/2023	INV#BD0168179	BATES FIBER	01-0000-0-5910-000-9670-2420-000-000	NN		697.00
	PV-240536	11/30/2023	INV#BD0168179	BATES FIBER	01-0000-0-8699-000-9670-2420-778-760	NN		-69.70
	PV-240536	11/30/2023	INV#BD0168179	BATES FIBER	01-0000-0-8699-000-9670-2420-778-760	NN		-557.60
				TOTAL PAYMENT AMOUNT		69.70 *		69.70
000548/00	LIRAS SUPERMARKET	680260589						
	PV-240538	11/30/2023	DHW	LIRAS	01-0000-0-4300-000-1695-2140-000-223	NN		554.72
				TOTAL PAYMENT AMOUNT		554.72 *		554.72
013794/00	NORTH DELTA WATER AGENCY	942256441						
	PV-240529	11/30/2023	INV#2875	BENEFIT ASSESSMENT	01-0000-0-5800-000-0000-8100-000-000	NN		325.88
				TOTAL PAYMENT AMOUNT		325.88 *		325.88
003270/00	PG&E	940742640						
	PV-240539	11/30/2023	NOV	DIST WIDE GAS	01-0000-0-5510-000-0000-8100-000-000	NN		49,989.69
				TOTAL PAYMENT AMOUNT		49,989.69 *		49,989.69

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
000055/00	SIA DELTA DENTAL								
PV-240533	11/30/2023	NOV 23 PREMIUMS		01-0000-0-3701-000-1590-1000-000-000	NN			2,842.96	
PV-240533	11/30/2023	NOV 23 PREMIUMS		01-0000-0-3702-000-9590-7200-000-000	NN			1,626.70	
PV-240533	11/30/2023	NOV 23 PREMIUMS		01-0000-0-3901-000-9133-7200-000-000	NN			207.49	
TOTAL PAYMENT AMOUNT								4,677.15 *	4,677.15
012084/00	SODEXO INC & AFFILIATES	520936594							
PV-240525	11/30/2023	ISLE GAME NIGHT		01-0000-0-5825-000-0000-3700-000-224	NN			212.13	
PV-240525	11/30/2023	PANTHER OF MONTH		01-0000-0-5800-000-1110-1000-000-222	NN			30.30	
PV-240525	11/30/2023	BOARD DINNER		01-0000-0-5825-000-0000-7110-000-000	NN			60.61	
PV-240525	11/30/2023	INV#122031		01-5466-0-4300-000-0000-3700-000-000	NN			7,508.04	
PV-240525	11/30/2023	INV#122032		01-5467-0-4300-000-0000-3700-000-000	NN			407.96	
PV-240525	11/30/2023	INV#122033		01-5467-0-4300-000-0000-3700-000-000	NN			1,826.12	
TOTAL PAYMENT AMOUNT								10,045.16 *	10,045.16
003646/00	STATE OF CALIFORNIA	946003786							
PV-240534	11/30/2023	INV#692487 FINGERPRINTS		01-0000-0-5870-000-0000-7400-000-000	NN			546.00	
TOTAL PAYMENT AMOUNT								546.00 *	546.00
001896/00	UPS	362407381							
PV-240531	11/30/2023	INV#30443 WKLY CHRGS		01-0000-0-5920-000-0000-7200-000-000	NN			41.67	
PV-240531	11/30/2023	INV#30433 WKLY CHRGS		01-0000-0-5920-000-0000-7200-000-000	NN			117.81	
TOTAL PAYMENT AMOUNT								159.48 *	159.48
014450/00	WIZIX	822534390							
PV-240526	11/30/2023	INV#367648 BATES		01-0000-0-5840-213-1110-1000-000-000	NN			223.79	
PV-240526	11/30/2023	INV#369147 RVHS		01-0000-0-5840-321-1110-1000-000-000	NN			1,420.80	
PV-240526	11/30/2023	INV#367308 DHW		01-0000-0-5840-223-1110-1000-000-000	NN			1,001.84	
PV-240526	11/30/2023	INV#367733 RMS		01-0000-0-5840-222-1110-1000-000-000	NN			725.31	
PV-240526	11/30/2023	INV#369825 RVHS		01-0000-0-5840-321-1110-1000-000-000	NN			132.02	
TOTAL PAYMENT AMOUNT								3,503.76 *	3,503.76
TOTAL Fund PAYMENT								77,835.84 **	77,835.84

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount
015265/00	CLARK PEST CONTROL OF STOCKTON	000000000							
PV-240530	11/30/2023	INV#34204320 PEST AWAY SRVCS		13-5310-0-5535-000-0000-8100-000-000	NN				135.00
		TOTAL PAYMENT AMOUNT							135.00 *
012084/00	SODEXO INC & AFFILIATES	520936594							
PV-240525	11/30/2023	INV#100238263 OCT LUN/BREK		13-5310-0-5800-000-0000-3700-000-000	NN				68,540.40
PV-240525	11/30/2023	INV#100238263 OCT SN/SU		13-5320-0-5800-000-0000-3700-000-000	NN				16,877.76
PV-240525	11/30/2023	INV#100238263 OCT CREDIT		13-5310-0-5800-000-0000-3700-000-000	NN				-8,327.71
PV-240525	11/30/2023	INV#100238263 OCT CREDIT		13-5320-0-5800-000-0000-3700-000-000	NN				-2,081.93
		TOTAL PAYMENT AMOUNT							75,008.52 *
		TOTAL Fund	PAYMENT						75,143.52 **
		TOTAL BATCH PAYMENT							152,979.36 ***
							0.00		152,979.36

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount

014382/00	GORNT0, JENNIE								
PV-240540	11/30/2023	REIMBURSEMENTS		01-1100-0-4300-000-1110-1000-000-223	NN				213.95
PV-240540	11/30/2023	REIMBURSEMENTS		01-1100-0-4300-000-1110-1000-000-223	NN				71.77
		TOTAL PAYMENT AMOUNT			285.72	*			285.72
014144/00	MARTINEZ, SANDRA								
PV-240542	11/30/2023	OCT MILEAGE		01-9328-0-5230-000-0001-3900-860-510	NN				97.73
		TOTAL PAYMENT AMOUNT			97.73	*			97.73
015871/00	NIITANI, TIFFANY								
PV-240541	11/30/2023	PBIS INCENTIVE		01-1100-0-4300-000-1110-1000-000-223	NN				124.56
		TOTAL PAYMENT AMOUNT			124.56	*			124.56
015175/00	RODRIGUEZ, CRISTAL								
PV-240543	11/30/2023	OCT MILEAGE		01-9328-0-5230-000-0001-3900-860-510	NN				74.02
		TOTAL PAYMENT AMOUNT			74.02	*			74.02
		TOTAL Fund	PAYMENT		582.03	**			582.03
		TOTAL BATCH PAYMENT			582.03	***	0.00		582.03

BATCH: 0121 EFT

<< Open >>

Fund : 01 GENERAL FUND

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef
Req Reference	Date	Description	Fd Resc Y	Objt Ste Goal	Fctn Opl Op2	T9MPS	Liq Amt	Net Amount
012586/00	BAY ALARM COMPANY	941493317	92 FIS/GLOBAL vCard					
PV-240515	11/30/2023	INV#20972863 RMS		01-0000-0-5540-222-0000-8300-000-000	NN			89.84
PV-240515	11/30/2023	INV#20963223 RMS		01-0000-0-5540-222-0000-8300-000-000	NN			65.50
PV-240515	11/30/2023	INV#20990730 RMS		01-0000-0-5540-222-0000-8300-000-000	NN			83.33
PV-240515	11/30/2023	INV#20993111 RMS		01-0000-0-5540-222-0000-8300-000-000	NN			75.75
PV-240515	11/30/2023	INV#20993028 RMS		01-0000-0-5540-222-0000-8300-000-000	NN			2,177.57
PV-240515	11/30/2023	INV#20998711 RMS		01-0000-0-5540-222-0000-8300-000-000	NN			116.69
PV-240515	11/30/2023	INV#20982911 RMS		01-0000-0-5540-222-0000-8300-000-000	NN			131.27
PV-240515	11/30/2023	INV#20986437 RMS		01-0000-0-5540-222-0000-8300-000-000	NN			91.44
PV-240516	11/30/2023	INV#20979482 DIST OFF		01-0000-0-5540-000-0000-8300-000-000	NN			67.85
PV-240516	11/30/2023	INV#20978249 DIST OFF		01-0000-0-5540-000-0000-8300-000-000	NN			109.76
PV-240516	11/30/2023	INV#20970747 DIST OFF		01-0000-0-5540-000-0000-8300-000-000	NN			182.25
PV-240516	11/30/2023	INV320989845 DIST OFF		01-0000-0-5540-000-0000-8300-000-000	NN			64.05
PV-240516	11/30/2023	INV#20997148 DIST OFF		01-0000-0-5540-000-0000-8300-000-000	NN			106.75
PV-240517	11/30/2023	INV#20966380 BATES		01-0000-0-5540-213-0000-8300-000-000	NN			112.50
PV-240517	11/30/2023	INV#20968486 BATES		01-0000-0-5540-213-0000-8300-000-000	NN			30.00
PV-240517	11/30/2023	INV#21013004 BATES		01-0000-0-5540-213-0000-8300-000-000	NN			86.79
PV-240517	11/30/2023	INV#20987077 BATES		01-0000-0-5540-213-0000-8300-000-000	NN			78.72
PV-240518	11/30/2023	INV#20963265 MOKE		01-0000-0-5540-335-0000-8300-000-000	NN			146.00
PV-240518	11/30/2023	INV#20998432 MOKE		01-0000-0-5540-335-0000-8300-000-000	NN			120.03
PV-240518	11/30/2023	INV#20999431 MOKE		01-0000-0-5540-335-0000-8300-000-000	NN			66.16
PV-240519	11/30/2023	INV#20992378 DHW		01-0000-0-5540-223-0000-8300-000-000	NN			250.96
PV-240519	11/30/2023	INV#21004354 DHW		01-0000-0-5540-223-0000-8300-000-000	NN			109.00
PV-240520	11/30/2023	INV#20977308 ISLE		01-0000-0-5540-224-0000-8300-000-000	NN			129.98
PV-240520	11/30/2023	INV#20973907 ISLE		01-0000-0-5540-224-0000-8300-000-000	NN			383.00
PV-240520	11/30/2023	INV#21009544 ISLE		01-0000-0-5540-224-0000-8300-000-000	NN			196.19
PV-240521	11/30/2023	INV#20974675 WGE		01-0000-0-5540-214-0000-8300-000-000	NN			169.26
PV-240521	11/30/2023	INV#20998999 WGE		01-0000-0-5540-214-0000-8300-000-000	NN			135.00
PV-240522	11/30/2023	INV#20971346 BUS GRGE RV		01-0720-0-5540-000-0000-8300-000-000	NN			59.29
PV-240522	11/30/2023	INV#20965995 BUS GRGE RV		01-0720-0-5540-000-0000-8300-000-000	NN			132.25
PV-240544	11/30/2023	INV#20985553 RVHS		01-0000-0-5540-321-0000-8300-000-000	NN			114.32
PV-240544	11/30/2023	INV#20981807 RVHS		01-0000-0-5540-321-0000-8300-000-000	NN			102.54
PV-240544	11/30/2023	INV#20977307 RVHS		01-0000-0-5540-321-0000-8300-000-000	NN			46.23
PV-240544	11/30/2023	INV#20971854 RVHS		01-0000-0-5540-321-0000-8300-000-000	NN			37.99
PV-240544	11/30/2023	INV#20969899 RVHS		01-0000-0-5540-321-0000-8300-000-000	NN			189.31
PV-240544	11/30/2023	INV#20967848 RVHS		01-0000-0-5540-321-0000-8300-000-000	NN			203.18
PV-240544	11/30/2023	INV#20966569 RVHS		01-0000-0-5540-321-0000-8300-000-000	NN			679.06
PV-240544	11/30/2023	INV#21014447 RVHS		01-0000-0-5540-321-0000-8300-000-000	NN			154.25
PV-240544	11/30/2023	INV#21014447 RVHS		01-0000-0-5540-321-0000-8300-000-000	NN			215.00
PV-240544	11/30/2023	INV#20999224 RVHS		01-0000-0-5540-321-0000-8300-000-000	NN			51.33
PV-240544	11/30/2023	INV#20990159 RVHS		01-0000-0-5540-321-0000-8300-000-000	NN			121.77
TOTAL PAYMENT AMOUNT								7,482.16 *
TOTAL Fund				CHECKS	0.00 **			0.00
TOTAL Fund				EFT	7,482.16 **			7,482.16
TOTAL Fund				PAYMENT	7,482.16 **			7,482.16
TOTAL BATCH CHECKS				0.00 ***	0.00			0.00
TOTAL BATCH EFT				7,482.16 ***	0.00			7,482.16
TOTAL BATCH PAYMENT				7,482.16 ***	0.00			7,482.16

Vendor/Addr	Remit name	Tax ID num	Deposit type	ABA num	Account num	EE ES	E-Term	E-ExtRef	
Req Reference	Date	Description	Fd Resc Y	Objt Ste	Goal Fctn	Op1 Op2	T9MPS	Liq Amt	Net Amount

TOTAL DISTRICT CHECKS	539,781.21	****	0.00	539,781.21
TOTAL DISTRICT EFT	17,604.57	****	0.00	17,604.57
TOTAL DISTRICT PAYMENT	557,385.78	****	0.00	557,385.78
TOTAL FOR ALL DISTRICTS CHK:	539,781.21	****	0.00	539,781.21
TOTAL FOR ALL DISTRICTS EFT:	17,604.57	****	0.00	17,604.57
TOTAL FOR ALL DISTRICTS:	557,385.78	****	0.00	557,385.78

Number of checks to be printed:	48, not counting voids due to stub overflows.	539,781.21
Number of EFT generated:	2	17,604.57

BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: _____

From: Stacy Wallace, Principal Isleton Elementary

Item Number: 10.4

Type of item: (Action, Consent Action or Information Only): _____ Consent Action

SUBJECT:

Request to approve the Isleton Elementary 6th Grade Students to attend Sly Park's Science Camp from January 22, 2024 to January 26, 2024. This includes the 24 students, teacher, and the required amount of chaperones.

BACKGROUND:

Sly Park is offering its 5 days 4-night stay at science camp. This educational opportunity is provided to our students through a partnership with the Sacramento County Office of Education. The students spend the week engaged in hands on learning opportunities in nature provided to them by credentialed science teachers. A few of the learning focuses and experiences include astronomy, forest ecosystems, daily hiking expeditions, as well as team building activities.

PRESENTER:

Stacy wallace, Principal Isleton Elementary School

OTHER PEOPLE WHO MIGHT BE PRESENT:

COST AND FUNDING SOURCES:

The cost is \$255 per person not to exceed a total amount of \$7,000. The 6th grade has raised this amount through fundraising opportunities, and donations.

RECOMMENDATION:

That the Board approves the Isleton Elementary School 6th Grade Students to Attend the Sly Park Science Camp, January 22-26, 2024.

Time allocated: 3 minutes

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2024

Attachments: X

From: Clarence Isadore, Principal

Item Number: 10.5

Type of item: (Action, Consent Action or Information Only): Consent

SUBJECT:

Request to Approve the Overnight Travel for Rio Vista High School's Model UN Club to Attend the Berkeley Model United Nations Conference on March 8-10, 2024

BACKGROUND:

Model United Nations, also known as Model UN, is an extra-curricular activity in which students typically role play as delegates to the United Nations. Model UN is a simulation of an actual United Nations Conference where students are tasked with solving a global issue through research, drafting, lobbying and debating to pass a suitable resolution. Rio Vista High School has a Model UN Club with 22 students who all have over a 2.5 GPA and meet weekly to discuss global topics and debate. The plan is to attend the Model UN Conference at the Cal UC Berkeley campus in March 2024.

STATUS:

Overnight travel requires Board approval. The travel is pending the student's ability to raise the funds.

PRESENTER:

Clarence Isadore, Principal

OTHER PEOPLE WHO MIGHT BE PRESENT:

Ann Katherine Smith, Maria Roman, Isaac Coleman

COST AND FUNDING SOURCES:

Funds have been raised Model UN Club through concessions and donations; current fundraising total is \$2,168.

Total Cost of Conference for 22 Students and 3 Chaperones

Conference Registration-\$1930; Lodging-\$2500; Food-\$750; Transportation-\$111; **Total: \$5291**

RECOMMENDATION:

That the Board approves the overnight trip and conference for the Rio Vista High School's Model UN Club with the understanding that this is a club activity so, if the funds are not acquired, the trip will be cancelled.

Time allocated: 2 minutes

BMUN LXXII

ADVISOR GUIDE



DROP & REFUND POLICY

The school deposit fee of \$60 is **non-refundable**.

A full refund on delegate fees may be granted if requested by **January 26, 2024**.

A partial refund on delegate fees may be granted if requested by **February 9, 2024**.

All requests to drop or reduce the delegation size for any refund must be communicated via email to info@bmun.org.

Late Delegate Fee Payment Fees:

To ensure that the registration process moves forward and that we are able to confirm the final attendees of the conference to best make preparations for BMUN LXXII, a late fee will be assessed to delegations who fail to make their delegate fee payments by the designated due date of their registration round. This late fee is dependent on the delegation size at the time of the delegation fee deadline. The total delegate fee amount for delegations with overdue fees are as follows:

Delegation registered for less than 15 students:

- [\$10 late fee assessed to the delegation overall] + [\$85 per delegate]

Delegation registered for 16-20 students:

- [\$20 late fee assessed to the delegation overall] + [\$85 per delegate]

Delegation registered for more than 20 students:

- [\$30 late fee assessed to the delegation overall] + [\$85 per delegate]

Please reference the chart below to identify your due date to make the delegate fee payment:

Registration Period (Registration application submitted on Huxley between...)	Delegate Fee Due (no late fee assessed if payment made prior to the due date)
Round 1: 9/18 - 10/6	10/27
Round 2: 10/7 - 11/3	12/1
Round 3: 11/4 - 12/8	1/5
Round 4: 12/9 - 1/12	1/26

If your delegation is having difficulties making the payments on time, please contact treasurer@bmun.org ahead of time to communicate your situation for potential waiver of the late fees.

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: No

From: Craig Cornelson, Principal

Item Number: 10.6

Type of item: (Action, Consent Action or Information Only): Consent

SUBJECT:

Request to Approve the Revised Dates and Location for Delta High School's Future Farmers of America (FFA) Students to Attend the Made for Excellence (MFE)/Advanced Leadership Academy Conference

BACKGROUND:

The Delta High FFA will attend the Made for Excellence (MFE)/Advanced Leadership Academy Conference (overnight) in Sonoma, CA on January 14-15, 2024 in lieu of the same conference in Sacramento, CA on January 12-13, 2024. The reason for the change is that MFE registration filled up only 6 minutes after opening for the Sacramento dates, meaning that 7 of our 11 students interested in attending would not be able to participate. To accommodate all 11 students, we re-registered at the Sonoma conference site. The Conferences themselves are identical; the only difference is the location and dates.

STATUS:

Delta FFA requests overnight travel approval to the Made for Excellence/Advanced Leadership Academy Conference in Sonoma on January 14-15, 2024.

PRESENTER:

Craig Cornelson, Principal

OTHER PEOPLE WHO MIGHT BE PRESENT:

Charles VanRiper, Agriculture Teacher

COST AND FUNDING SOURCES:

AG Incentive Grant and Site Funds

RECOMMENDATION:

That the Board approves the 2023-2024 overnight FFA trip with adjusted date and location.

Time allocated: 2 minutes

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: X

From: Craig Cornelson, Principal

Item Number: 10.7

Type of item: (Action, Consent Action or Information Only): Consent Action

SUBJECT:

Request to Approve an Overnight Field Trip for the Delta High School (DHS) Wrestling Team to Attend the 2023 CLHS Michael Kroppmann Memorial Wrestling Tournament in Lakeport, CA from December 15-16, 2023

BACKGROUND:

DHS and Clarksburg Middle School (CMS) 9th graders would like to participate, per invite, in the 2023 CLHS Michael Kroppmann Memorial Tournament in Lakeport, CA.

STATUS:

DHS is requesting overnight travel approval from the River Delta Unified School District Board of Trustees. The wrestling team will departure on Friday, December 15, 2023 at 5pm from DHS in Clarksburg, CA. The team will stay one night in Lakeport and participate in the tournament on Saturday, December 16th. The team will arrive back at DHS on Saturday at approximately 7:30 pm.

PRESENTER:

Craig Cornelson, Principal

OTHER PEOPLE WHO MIGHT BE PRESENT:

Alfonso Valles (DHS Wrestling Coach)

COST AND FUNDING SOURCES:

Funding Source: Associated Student Body Account (Wrestling)

Trip Total: \$1250.00

Hotel: \$600.00

Fuel (2 vans): \$300.00

Tournament Fee: \$350.00

RECOMMENDATION:

That the Board Approves the overnight travel for the Delta High School's Wrestling Team to participate in the 2023 Clear Lake High School's Michael Kroppmann Memorial Wrestling Tournament in Lakeport, CA

Time allocated: 2 minutes



2023 CLHS Michael Kroppmann Memorial Tournament

- **Date:** December 16TH 2023
- **Location:** 350 Lange ST. Lakeport, CA 95453
- **Line-ups:** You will register your team on trackwrestling
(tournament will be up soon)
- **Weigh-ins:** 8:00AM - 9:00AM
- **Tournament Start:** 10:00AM
- **Weight Class:** Standard High School Weights.
- **Fees:** \$300 Team/\$30 individually 7 or less
(Checks to - Clear Lake High School Wrestling Team. Pay at door with email confirmation.) Open to entry fee swap +/-
- **Awards:** Top 3 Team Trophies
Top 4 Individual Medals
Light & Heavy Weight MVP
- **24 Team Limit/Brackets full**

Lakeport Tournament
Boys and Girls
December 15-16th
Itinerary & Costs

Friday December 15th

5pm-Leave DHS

7:30pm-Arrive at Lakeport, CA

8:00pm-Check in to hotel TBA

Saturday December 16th

8am-Weigh Ins

10am-Tournament begins.

2pm-Finals Begin

5pm-Head back to DHS

7:30PM-Arrive back at DHS

Hotel Address: TBA

Event Address: 350 Lange ST. Lakeport, CA 95453

Costs: Through ASB account

Hotel Rooms: 6 rooms total.

Total Price: \$600

Fuel: 2 Vans

Total Price: \$300

Tournament Fee: \$350

Trip Total: \$1250

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: _____

From: Clarence Isadore, Principal

Item Number: 10.8_____

Type of item: Action_____

SUBJECT:

Request to Approve the America Field Service (AFS) Overnight and Out-of-State Field Trip for Rio Vista High School AFS Students to Travel on April 26-29, 2024 Roosevelt High School- Wyandotte, Michigan

BACKGROUND:

Since the late 90's, Rio Vista High School has participated in a short-term domestic exchange with schools across the country. Typically held in the spring, a group of students from AFS Club travel to a host school. In prior years have traveled to Illinois, Massachusetts, New Jersey, New York, North Carolina, Wisconsin, and Connecticut. We utilize non-student calendar days on the district calendar to minimize absences and substitute cost, which have been covered by the club the past few years.

This year we are visiting a school outside of Detroit, Michigan and will see the Ford Museum and possibly the Rock & Roll Hall of Fame. The annual AFS Domestic Exchange is a wonderful opportunity for our students to participate in a cultural exchange, helping them appreciate those who are different than we are, and making them better global citizens.

STATUS:

Overnight and out-of-state travel requires Board approval.

PRESENTER:

Clarence Isadore, Principal

OTHER PEOPLE WHO MIGHT BE PRESENT:

Donnie Surla, AFS Advisor and Rio Vista High School Teacher
Jennie Gornto, AFS Parent and DH White Elementary School Principal
16 students

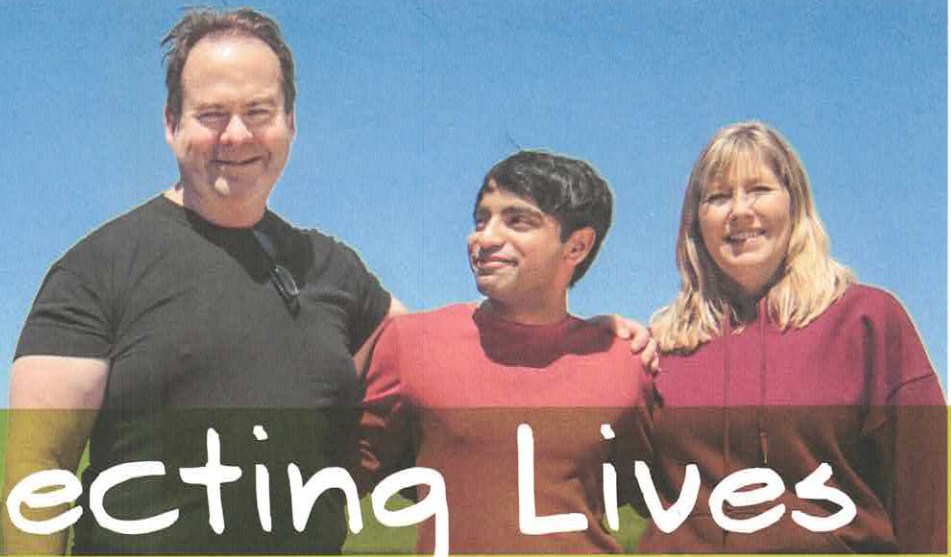
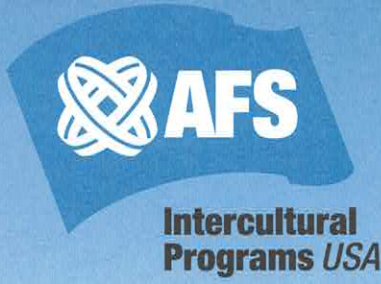
COST AND FUNDING SOURCES:

No cost to RDUSD. The Club is fundraising to cover the cost of Chaperones and substitutes as well as a weekend of hosting the Wyandotte students (February 24, 2023). Fundraisers are already approved through ASB at the beginning of the year. We have received funds in the past from RVHS Boosters Club and the Montezuma Hills Volunteer Fire Dept.

RECOMMENDATION:

That the Board approves the Overnight and Out-of-State Field Trip for Rio Vista High School AFS Students to travel on April 26-29, 2024, to Roosevelt High School in Wyandotte, Michigan with the understanding that this is a club activity so, if the funds are not acquired, the trip will be cancelled.

Time allocated: 2 minutes



Connecting Lives



Sharing Cultures

Study Abroad • Host a Student • Volunteer

AFS is a worldwide, nonprofit organization that has been a leader in international high school student exchange for more than 65 years.

Visit www.afsusa.org or call 1-800-AFS-INFO



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One Day Travel - School Business Request for Approval and Reimbursement Claim Form

Date Submitted for Prior Approval 11/30/23
(Must be submitted 10 working days prior to trip)

Date of Training: 4/29/24 Training Time: all day

Name of Employee Donalda Surla Department/School _____

Name of Conference *(If applicable)* AFS Short-Term Domestic Exchange On Site _____ Off Site

Registration Fees:	Estimated Expenses:	Actual Expenses:
Transportation:	Total: _____	Total: _____
Personal auto mileage: _____ miles @ __.655_____	Total: _____	Total: _____
District vehicle: ___ Yes ___ No	Total: _____	Total: _____
Time of use for district vehicle: Starting _____ Ending _____	Total: _____	Total: _____
Other <i>(parking, bridge tolls etc.)</i> : _____	Total: _____	Total: _____
	Total Estimated Costs: _____	Total Actual Expenses: _____


FUND	RESOURCE	YEAR	OBJECT	SITE	GOAL	FUNCTION	LO-1	LO-2	AMOUNT

Substitute Required: Yes _____ No _____ Site employee coverage _____ Yes _____ No _____
Employees who will be covering: _____

SUB ACCOUNT CODING MUST BE COMPLETED BELOW:

FUND	RESOURCE	YEAR	OBJECT	SITE	GOAL	FUNCTION	LO-1	LO-2	AMOUNT

~~AFS~~ AFS will cover sub costs

Prior approval Signatures:
Principal/Director:  Business Services: _____ Superintendent: _____

Approval for reimbursement *(submit within ten (10) days of travel)*:
Claimant: _____ Business Services: _____

Clarence Isadore

From: Donnie Surla
Sent: Monday, November 27, 2023 4:31 PM
To: Clarence Isadore
Subject: AFS Trip Board Briefing
Attachments: WAAC Itinerary 2023.docx; LHSAFS.docx

Hi Mr. Isadore,

Below is the information you will need for the board briefing on the annual AFS exchange. Please let me know if there is anything you see missing. I'm attaching sample itineraries as well.

Thank you!

-D.S.

Annual AFS Trip Board Briefing

DATE of Proposed Trip: April 26th—29th, 2024
DESTINATION: Roosevelt High School—Wyandotte, Michigan
COST to Students: approx. \$625 each (covers airfare and excursions in Michigan)
CHAPERONES: Donnie Surla, AFS advisor and RVHS teacher
Jennie Gornto, AFS parent and DH White principal
of Students: approx. 15, depending on sign-ups

COST to District: None—the club fundraises to cover the cost of chaperones and substitutes as well as a weekend of hosting the Wyandotte students (Feb. '24). Fundraisers are already approved through ASB at the beginning of the year. We also have received funds in the past from the RVHS Booster Club and the Montezuma Hills Volunteer Fire Department.

BACKGROUND INFORMATION: Since the late 90's, RVHS has participated in a short-term domestic exchange with schools across the country. Typically held in the spring, a group of students from an AFS club travel to a host school (we have visited Illinois, Massachusetts, New Jersey, New York, North Carolina, Wisconsin, and Connecticut since I became advisor in 2016). We utilize non-student calendar days on the district calendar to minimize absences and substitute costs, which have been covered by the club the past few years.

I am attaching two sample itineraries, one from a past exchange, and one from the exchange that this year's host did the 2022-2023 school year. It will give you an idea of the type of activities that are done on these trips.

This year we are visiting a school outside of Detroit, Michigan and will see the Ford Museum and possibly the Rock & Roll Hall of Fame. The annual AFS Domestic Exchange is a wonderful opportunity for our students to participate in a cultural exchange, helping them appreciate those who are different than we are, and making them better global citizens.

Thanks for your time, and please let me know if you have any questions.

-Donnie Surla

Past

WAAC Itinerary for March 3rd - 7th

Friday, March 3rd

- Airport pick up: 6:15 - 6:30 PM
- Potluck at Jacob's: 7:00 PM
- Home

Saturday, March 4th

- Henry Ford Museum: 9:30 - 11:30 AM
- Lunch on your own - 11:30 - 1:00 PM
 - Suggestions: Leo's Coney Island, any middle Eastern restaurant, Ford's Garage, make a picnic lunch and eat on Belle Isle
- Belle Isle, aquarium: 1:30 - 2:30 PM
- DIA : 3:00 - 4:45 PM
- Ride Q-Line to Hart Plaza and time to explore Detroit: 5:15 - 6:30/6:45 PM
- Dinner on your own/home/Buddy's Pizza

Sunday, March 5th

- Michigan Stadium for pictures (no tour): 10:00 AM
- Ann Arbor Museum of Natural History: 10:30 AM - 12:00 PM
- Walk through U of M Campus: 12:00 - 1:00 PM
- Lunch on your own and explore downtown Ann Arbor: 1:00 - 3:00? PM
- Home for dinner, spend time with family and friends

Monday, March 6th

- Meet in LMC mezzanine: 7:30 AM
 - Mezzanine will be home base for the day
- Meet in mezzanine for lunch: 11:35 AM (A-Lunch)
 - Little Pierogi and Crepe Kitchen
- Wyandotte tour with Mr. Purdu: 12:30 - 3:00 PM
 - We will end the tour in Bishop Park so you can stay and explore Wyandotte more or go home, dinner on your own
- Dessert party at Tadgh's - 8:00 PM

Tuesday

- Students to attend class until 9:30 AM then we will leave for the airport
 - Light breakfast in mezzanine at 7:30 AM

Past

AFS WEEKEND IN LISLE, IL

April 6th-9th, 2017

Thursday, April 6th

- 10am: Meet in RVHS Teacher Parking lot, load up with drivers.
- 12-12:30pm: Arrive at SFO. Check into flights.
- 3:10pm: Fly SFO-MDW
- 9:45pm: Arrive at MDW, collect baggage, board LHS bus.
- 11pm: Arrive at LHS, meet hosts and go to their homes. Bedtime!

Friday, April 7th

- 7:15-7:45am: Breakfast provided in the LHS library.
- 7:45am: School begins. Shadow your hosts classes.
- 3pm: Return to your host's home. Free time with your family.
- 6-9pm: AFS Potluck at the Twaddle's home (hosts drive). Food & Games
- 9pm: Return to hosts. Get a good night's sleep!

Saturday, April 8th

- 9am: Meet at LHS parking lot to board bus for Chicago (eat breakfast w/hosts)
- 10-11:45am: Museum of Science and Industry
- 11:45am: Board bus and head to the Water Tower/Miracle Mile
- 12-3pm: Shopping, Sight Seeing and Lunch
- 3pm: Meet at Water Tower for Gangster Bus Tour (2hrs)
- 5:15pm: Board LHS bus for return to Lisle
- 6:30pm: Arrive in Lisle. Hang out at the school or freshen up at hosts' homes
- 7:30pm: See LHS Production of Footloose.
- 9:30pm: Return to Hosts' homes. Goodnight!

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 9457-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: _____

From: Tammy Busch, Asst. Superintendent of Business Services Item Number: 10.9

Type of item: (Action, Consent Action or Information Only): Consent Action

SUBJECT:

Donations to Receive and Acknowledge:

Isleton Elementary School – 6th Grade Sly Park Science Camp

Bob's Bait Shop - \$255

McDonald's (My Edeavors Inc.) - \$510

Moreno Trenching - \$1530

Isleton Coffee Company - \$510

McBoodery - \$510

Dolk Tractor - \$225

Alma Raygoza - \$700

Steve Wright - \$255

Bates Elementary School – Associated Student Body Account

Bates Elementary Parent Teacher Association - \$5,865

BACKGROUND:

According to Board Policy 3290, the Board may accept any gift, grant or bequest of money, property, or service to the District and before acceptance shall carefully consider any conditions or restrictions.

STATUS:

Donations are listed for Board acceptance.

PRESENTER:

Tammy Busch, Asst. Superintendent of Business Services

OTHER PEOPLE WHO MIGHT BE PRESENT:

Staff

COST AND FUNDING SOURCES:

RECOMMENDATION:

That the Board acknowledge and approve the receipt of these donations

Time allocated: 2 minutes

BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: X_____

From: Katherine Wright, Superintendent

Item Number: 11_____

Type of item: (Action, Consent Action or Information Only): Action_____

SUBJECT:

Complete the Reorganizational Duties (under the provisions of Ed Code Sections 35143 and 50171), the Board is to Conduct Reorganizational Duties Including the Setting and Approving of Their Regular Meeting Schedule for the Upcoming Calendar Year, 2024.

BACKGROUND:

Every year in December, the Board must complete their reorganizational duties (under the provisions of Ed Code 35143 and 50171) by setting and approving the schedule of Regular Board Meetings for next calendar year.

STATUS:

Attached is a draft of the Regular Board Meeting schedule for 2024.

The regularly scheduled meeting in February will be held on the third Tuesday of the month due to layoff deadlines. In June, there are two regularly scheduled meetings: one on the 2nd and 4th Tuesday due to Local Control and Accountability Plan and Budget Timelines. The December meeting is held on the Tuesday following the second Friday of December due to AB2449 becoming effective January 1, 2019.

PRESENTER:

Katherine Wright, Superintendent

OTHER PEOPLE WHO MIGHT BE PRESENT:

Staff

COST AND FUNDING SOURCES:

RECOMMENDATION:

That the Board completes their reorganizational duties by setting and approving their meeting schedule for the upcoming year, 2024.

Time allocated: 3 minutes



RIVER DELTA UNIFIED SCHOOL DISTRICT

445 Montezuma Street
 Rio Vista, California 94571-1651
 (707) 374-1700 Fax (707) 374-2995
<http://riverdelta.org>

RIVER DELTA UNIFIED SCHOOL DISTRICT SCHEDULE OF REGULAR BOARD MEETINGS

2024

AGENDA BRIEFINGS AND BACK-UP DOCUMENTS DUE (Thursdays – 4p.m.)	BOARD MEETING DATES Generally the 2 nd Tuesday except for February, June and December	LOCATION OF MEETINGS VARIOUS SITES Available to view via Zoom	GENERAL OPEN SESSION Will begin at 6:30 P.M. (unless noted or changed)
December 28	January 9	Rio Vista Theater	6:30 p.m.
February 8	*February 20	Isleton	6:30 p.m.
February 29	March 12	Walnut Grove	6:30 p.m.
March 28	April 9	Bates	6:30 p.m.
May 2	May 14	Clarksburg	6:30 p.m.
May 30	June 11	Walnut Grove	6:30 p.m.
June 13	*June 25	Rio Vista Theater	6:30 p.m.
NO	MEETING	JULY	2024
August 1	August 13	Isleton	6:30 p.m.
August 29	September 10	Walnut Grove	6:30 p.m.
October 3	October 8	Bates	6:30 p.m.
October 31	November 12	Clarksburg MS	6:30 p.m.
December 5	*December 17	Rio Vista Theater	6:30 p.m.

NOTE: * February's regularly scheduled meeting will be held on the third Tuesday of the month due to layoff deadlines, June will hold two meetings one on the 2nd and 4th Tuesday at 6:30pm due to LCAP and Budget Timelines. December's regularly scheduled meeting will be held the Tuesday following the second Friday due to AB2449 becoming effective January 1, 2019.

Board agenda briefings and backup documents are due to Mrs. Gaston in their electronic form by 4:00 p.m. on due date listed above if they are to be included on the agenda for the upcoming regular scheduled Board Meeting. Board briefings must be submitted in Word and Back up materials may be in a Microsoft Office program or pdf format. Board Briefing and backup materials must be submitted by email, faxed or hand-delivered hard copies are not accepted.

Note: ► **Agenda item requests must be approved first by the site administrator.** Site Administrators may have to attend a Cabinet meeting prior to the Board meeting for final approval for its inclusion (check with Mrs. Gaston).

Jennifer Gaston
 Executive Assistant to Superintendent, Katherine Wright
 445 Montezuma Street, Rio Vista, CA 94571
 707-374-1711
jgaston@rdusd.org

Draft: December 12, 2023

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: X

From: Katherine Wright, Superintendent

Item Number: 12

Type of item: (Action, Consent Action or Information Only): Action

SUBJECT:

Request to Approve the Second and Final Reading of the Updated or New Board Policies, Administrative Regulation and or Exhibits Due to New Legislation or Mandated Language and Citation Revisions as of September 2023 and Special Revisions as of October 2023.

BACKGROUND:

Changes in legislation and amendments to laws lead to necessary/mandated changes in District Board Policies, Administrative Regulations and Exhibits.

STATUS:

Attached are Board Policies, Administrative Regulations and Exhibits which have been affected by changes in law effective prior to September 2023 and special revisions as of October 2023.

These Board Policies, Administrative Regulations and Exhibits were submitted for a first reading at the November 14, 2023 Board meeting.

PRESENTER:

Katherine Wright, Superintendent

OTHER PEOPLE WHO MIGHT BE PRESENT:

Jennifer Gaston, Recorder

COST AND FUNDING SOURCES:

RECOMMENDATION:

That the Board approves the second and final reading of these Board Policies, Administrative Regulations and Exhibits as submitted resulting from legislation effective prior to September 2023 and the special revisions as of October 2023.

Time allocated: 3 minutes

CSBA POLICY GUIDE SHEET

September 2023

Note: Descriptions below identify revisions made to CSBA's sample board policies, administrative regulations, board bylaws, and/or exhibits. Editorial changes have also been made. Districts and county offices of education should review the sample materials and modify their own policies accordingly.

Board Policy 1160 – Political Processes

Policy updated to reflect **NEW LAW (AB 1416, 2022)** which requires the ballot label or similar description of a school district (or other local government) measure on a county ballot to list, either as a supporter or an opponent of the measure, the associations, nonprofit organizations, businesses, or individuals, including current or former elected officials such as Governing Board members, who have signed the ballot argument or are listed in the text of the argument in support or opposition of the measure unless the county board of supervisors elects not to list such supporters and opponents.

Board Policy 1330 – Use of School Facilities

Policy updated to caution districts when charging religious groups direct costs for use of district facilities when those costs are not charged to other groups due to the potential conflict between a U.S. Supreme Court decision and state law. Policy also updated to add that the Governing Board may authorize the use of a school building as a vote center on election day and/or during the 10 days preceding election day, as well as during key dates necessary for drop-off, set-up, and pickup of election materials, as determined by the election official.

Administrative Regulation 1330 – Use of School Facilities

Regulation updated to encourage districts to create a facilities use application and agreement for the use of school facilities and grounds by any entity other than the district, add that anyone applying to use school facilities do so as specified in district procedures and in accordance with law, and reflect **NEW LAW (AB 2028, 2022)** which authorizes the Governing Board to allow district facilities to be used by local law enforcement, public agencies, nonprofit associations, or organizations for bicycle, scooter, electric bicycle, motorized bicycle, or motorized scooter safety instruction for district students.

Delete - Exhibit(1) 1330 – Use of School Facilities

Exhibit deleted as unnecessary with relevant material included in administrative regulation 1330 – Use of School Facilities.

Administrative Regulation 3311 - Bids

Regulation updated to reference the bid limit for 2023, add that for lease-leaseback, design-build, and alternative design-build projects the notice which solicits the call for bids is required to specify that the project is subject to skilled and trained workforce requirements, and reflect **NEW LAW (AB 185, 2022)** which adds, until January 1, 2029, the alternative design-build construction delivery method for projects in excess of \$5,000,000. Regulation also updated to reflect the State Allocation Board's (SAB) notification to districts which provides that modular school facilities must be competitively bid and that districts that use piggyback contracts for modular facilities are ineligible for state funding from SAC administered programs.

Administrative Regulation 3311.3 – Design-Build Contracts

Regulation updated to add that, until January 1, 2025, design-build contracts may be entered into and approved by the Governing Board. Regulation also updated to reflect **NEW LAW (AB 185, 2022)** which (1) adds, until January 1, 2029, the alternative design-build construction delivery method for projects in excess of \$5,000,000, (2) specifies that alternative design-build contracts may be awarded to the low bid or the best value, taking into consideration, at a minimum, design cost, general conditions, overhead, and profit as a component of the project price, technical design and construction expertise, and life-cycle costs, (3) provides that the district's determination of price shall be based on the open book evaluation of construction subcontracts, (4) includes that the contract may be subject to further negotiations or amendment and may be terminated by the district if the district and the design-build entity are unable to reach an agreement, and (5) requires an alternative design-build proposal for an alternative design-build project to include (a) design cost,

general conditions, overhead, and profit as a component of the project price, unless a stipulated sum for the project is specified, (b) technical design and construction expertise, and (c) life-cycle costs over 15 or more years.

Board Policy 3312 - Contracts

Policy updated to reflect **NEW LAW (SB 1439, 2022)** related to conflict of interest from campaign contributions and **NEW LAW (SB 34, 2022)** related to bribery of a public official, and include a general statement requiring Governing Board members and district employees who are involved in the making of contracts on behalf of the district to comply with the district's conflict of interest policy.

Board Policy 3460 – Financial Reports and Accountability

Policy updated to add material related to districts facing insolvency who are considering applying for an emergency apportionment, including that the Governing Board is required to discuss the need for an emergency apportionment at a regular or special meeting at which parents/guardians, the exclusive representatives of employees of the district, and other members of the community have the opportunity to provide testimony.

Board Policy 3551 – Food Service Operations/Cafeteria Fund

Policy updated to reflect **NEW LAW (SB 490, 2022)** which requires districts participating in the National School Lunch and/or Breakfast Program, with annual reimbursement of \$1,000,000 or more, to (1) specify in the solicitation for bids and contracts for an agricultural food product that only the purchase of agricultural food products grown, packed, or processed domestically is authorized, unless a specific exception applies, including if the quality of the domestic product is inferior to the quality of the nondomestic product or if the bid or price of the nondomestic product is more than 25 percent lower than the bid or price of the domestic product, and (2) retain documentation justifying the use of the exception for three years from the date of purchase. Policy also updated to reflect **NEW LAW (AB 778, 2022)** which requires a district to accept a bid or price for an agricultural food product grown in California before accepting a bid or price for a domestic agricultural food product that is grown outside the state, when certain conditions are met.

Administrative Regulation 3551 – Food Service Operations/Cafeteria Fund

Regulation updated to include the requirement for a district with an on-site food facility to arrange to recover the maximum amount of edible food that would otherwise be disposed of and donate it to a local food recovery organization, and maintain records related to edible food recovery including a list of each food recovery service or organization that collects or receives the district's edible food, contact information for the service or organization, the types of food, frequency, and quantity that will be collected or hauled by the district, and a copy of contracts or written agreements between the district and food recovery services or organizations. Regulation also updated to reflect California Department of Education Nutrition Services Division Management Bulletin SNP-04-2022 which raises the excess net cash resources limitation to six months' average expenditures.

Board Policy 4151/4251/4351 – Employee Compensation

Policy updated to add that for districts participating in the Classified School Employee Summer Assistance Program, eligible classified employees may elect to have up to 10 percent of the employee's monthly salary withheld and paid out during the summer recess in either one or two payments, and reflect **NEW LAW (AB 185, 2022)** which adds specific repayment procedures when a district has made a wage overpayment to a district employee.

Administrative Regulation 4217.3 – Layoff/Rehire

Regulation updated to reflect **NEW LAW (SB 913, 2022)** which provides that for districts with an average daily attendance of less than 250,000, the definition of "length of service" for the purpose of the order of layoff and determination of seniority is the employees' hours in paid status. Regulation also updated to reflect **NEW LAW (AB 185, 2022)** which authorizes a classified employee to be represented by an attorney or nonattorney representative of the exclusive representative of the district's classified employees at a hearing requested by an employee as part of layoff proceedings.

Board Policy 5131.9 – Academic Honesty

Policy updated to address prohibited and permitted student use of technology, including artificial intelligence, as it relates to academic honesty. Policy also updated to include that a student with a disability be permitted to use technology for any purpose for which technology is identified in the student's individualized education program, that a student be given the opportunity to demonstrate that the use of technology was in accordance with policy when suspected by an employee that such use was in violation of academic honesty, and that any information acquired from an employee's use of technology in determining whether a student has committed an act of academic dishonesty be shared with the student and the student's parent/guardian, as appropriate. Additionally, policy updated to authorize the provision of staff training regarding the use of technology to improve education, including the detection of plagiarism and sensitivity to potential discrimination from algorithmic bias.

Board Policy 6154 – Homework/Makeup Work

Policy updated to add that meaningful homework can provide enrichment, address student use of technology, including artificial intelligence, as it relates to homework and makeup work, provide that teacher training may include designing homework assignments that inspire students' interests, include that students may work with other students and use approved outside resources as directed by the teacher, and move material related to notifying the student's parents/guardians when a student repeatedly fails to complete homework so that it follows chronologically.

Board Policy 6162.5 – Student Assessment

Policy updated to reflect that prohibited and permitted student use of technology, including artificial intelligence, in relation to assessment, be as specified in Board Policy 5131.9 – Academic Honesty and Board Policy 6163.4 – Student Use of Technology, reference **NEW LAW (AB 114, 2023)** which includes long term English learners as a numerically significant student subgroup for purposes of demonstrating comparable improvement in academic achievement by all numerically significant subgroups, include that state interim and formative assessments may be used to communicate with students' parents/guardians and for use in identifying professional development, and that results of an individual student on the California Assessment of Student Performance and Progress may be released to a postsecondary educational institution for the purpose of credit, placement, or admission.

Administrative Regulation 7140 – Architectural and Engineering Services

Regulation updated to more closely align with law and to reflect **NEW LAW (AB 185, 2022)** which enables a district to enter into an alternative design-build contract with a single entity for both design and construction of any school facility if the contract is in excess of \$5,000,000.

Board Bylaw 9124 – Attorney

Bylaw updated to revise the first philosophical paragraph to recognize the need to provide legal representation to the district and the importance of cost-effective legal advice and services, clarify that the Governing Board may appoint and fix and order paid legal counsel's compensation, expand the types of entities that the Board may contract with to serve as legal counsel, and reflect that the Board supports pursuing collaborative legal efforts with other districts as well as other government agencies as appropriate. Bylaw also updated to clarify that districts may, but are not required, to initiate a Request for Proposals to advertise and solicit proposals for legal services, and that districts may consider the attorney's, firm's, and/or entity's relevant legal reputation when evaluating such attorneys, firms, and/or entities. Additionally, bylaw updated to reflect that any attorney representing the district is required to be admitted to practice law in California.

CSBA POLICY GUIDE SHEET
Instructional Materials Special Packet October 2023

Note: Descriptions below identify revisions made to CSBA's sample board policies, administrative regulations, board bylaws, and/or exhibits. Editorial changes have also been made. Districts and county offices of education should review the sample materials and modify their own policies accordingly.

Board Policy 0410 - Nondiscrimination in District Programs and Activities

Policy updated to reflect **NEW LAW (AB 1078, 2023)** which (1) requires that the district's policy prohibiting discrimination, harassment, intimidation, and bullying include a statement that the policy applies to all acts of the Governing Board and Superintendent in enacting policies and procedures that govern the district, (2) clarifies when it is unlawful discrimination for the Board to refuse to approve the use or prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library, (3) requires the California Department of Education to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum, and (4) provides that complaints alleging discrimination related to the use or prohibited use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library may be brought under the district's uniform complaint procedures or may be directly filed with the Superintendent of Public Instruction, as specified. Policy also updated to reference **NEW U.S. DEPARTMENT OF EDUCATION OFFICE FOR CIVIL RIGHTS GUIDANCE** documents which provide that (1) a district may not separate students based on race, but may include group discussions or activities that focus on race as part of the curriculum, courses, or programs so long as access or participation is not permitted or limited based on race, (2) a school-sponsored program with emphasis on race, such as a student club, that is open to all students, typically would not violate Title VI solely because of its race-related theme, and (3) a district's responsibility not to discriminate against students applies to any of its programs or activities, whether directly or through contractual or other arrangements. Additionally, policy updated to expand the list of characteristics for which discrimination is prohibited in order to more closely align with law; and, to reflect **NEW LAW (SB 523, 2022)** which includes reproductive health decisionmaking as a characteristic for which employees, job applicants, unpaid interns and volunteers are protected against unlawful discrimination and harassment.

Board Policy 1312.2 - Complaints Concerning Instructional Materials

Policy updated to reflect **NEW LAW (AB 1078, 2023)** which (1) requires the California Department of Education (CDE) to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum, (2) clarifies when it is unlawful discrimination for the Governing Board to refuse to approve the use or prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library, (3) provides that complaints alleging discrimination related to the use or prohibited use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library may be brought under the district's uniform complaint procedures or may be directly filed with the Superintendent of Public Instruction, as specified, and (4) requires CDE to issue, by July 1, 2025, guidance regarding how to review instructional materials to ensure that they represent diverse perspectives and are culturally relevant. Policy also updated to expand and amend the list of criteria to be considered when instructional or library materials are being challenged; and, to provide that, unless required by law, any challenged material that is reviewed by the district will not be subject to further reconsideration for 12 months.

Administrative Regulation 1312.2 - Complaints Concerning Instructional Materials

Regulation updated to provide that for an instructional materials complaint for a nonprinted material the location of the objection be given; include that acknowledgement of receipt of an instructional materials complaint and notification of a review committee's decision be in writing; and, add that staff, in addition to the Superintendent or designee and teacher(s), be notified by the Principal as appropriate when an instructional materials complaint is received. Regulation also updated to delete material in the section

"Formal Complaint" related to a request by a parent/guardian who has filed a complaint for the student to be excused from using the challenged material while the complaint is pending; and, move the section "Review Committee" to come before the section "Superintendent Determination" so that it follows chronologically. Additionally, regulation updated to amend the section "Review Committee" to provide that (1) the Superintendent or designee may appoint parents/guardians and students, in addition to administrators and staff from relevant instructional and administrative areas, to serve on the committee, (2) include that the Superintendent or designee may provide training to the review committee to ensure the committee is informed regarding its responsibilities, applicable laws, and Board policies and administrative regulations when reviewing instructional materials, and (3) delete the list of criteria to be considered when instructional materials are being challenged, as this list is provided in the accompanying Board policy.

Exhibit(1) 1312.2 - Complaints Concerning Instructional Materials

Exhibit updated to specify that the "Request for Reconsideration of Existing Instructional Materials" form is for use when challenging the content of any existing textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or other resource in a school library. Exhibit also updated to accommodate for digital instructional materials; merge together portions of the form that are content related; and, change from a checklist to an open ended response the portion regarding the complainants preference for what should be done about a challenged instructional material.

Board Policy 1312.3 - Uniform Complaint Procedures

Policy updated to ensure compliance with the California Department of Education's (CDE) 2023-24 federal program monitoring instrument, and reflect **NEW LAW (AB 1078, 2023)** which (1) clarifies when it is unlawful discrimination for the Governing Board to refuse to approve the use or prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library, (2) provides that complaints alleging discrimination related to the use or prohibited use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library may be brought under the district's uniform complaint procedures or may be directly filed with the Superintendent of Public Instruction, as specified, and (3) requires CDE to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum. Policy also updated to reflect that the California Department of Fair Employment and Housing is now called the California Civil Rights Department.

Administrative Regulation 1312.3 - Uniform Complaint Procedures

Regulation updated to reference **NEW LAW (AB 1078, 2023)** which (1) clarifies when it is unlawful discrimination for the Governing Board to refuse to approve the use or prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library, (2) provides that complaints alleging discrimination related to the use or prohibited use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library may be brought under the district's uniform complaint procedures or may be directly filed with the Superintendent of Public Instruction, as specified, and (3) requires the California Department of Education (CDE) to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum. Regulation also updated to ensure compliance with CDE's 2023-24 federal program monitoring instrument

Administrative Regulation 1312.4 - Williams Uniform Complaint Procedures

Regulation updated to reflect **NEW LAW (AB 1078, 2023)** which (1) requires the California Department of Education (CDE) to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum, (2) provides that complaints related to instructional materials alleging that more than one student does not have sufficient textbooks or instructional materials as the result of an act by the Governing Board, or the Board's failure to remedy the deficiency, may be filed with the Superintendent of Public Instruction (SPI) directly, and the SPI may directly intervene without waiting for an investigation, and, (3) requires CDE, upon a finding that a district has not provided sufficient textbooks or instructional

materials, to take all remedial actions required by law, including purchasing textbooks and instructional materials and assessing a financial penalty against the district's local control funding formula. Regulation also updated to reflect **NEW LAW (SB 114, 2023)** which requires that the Williams uniform complaint procedure be used to address a complaint related to teacher misassignment that claims that a teacher who lacks credentials or training to teach English learners is assigned to teach a class with one or more English learners in the class, (formerly with more than 20 percent English learners in the class), and **NEW LAW (SB 760, 2023)** which authorizes districts to temporarily close a restroom for a documented student safety concern, an immediate threat to student safety, or to repair the facility.

Exhibit(1) 1312.4 - Williams Uniform Complaint Procedures

Exhibit updated to reference **NEW LAW (SB 760, 2023)** which authorizes districts to temporarily close a restroom for a documented student safety concern, an immediate threat to student safety, or to repair the facility, and **NEW LAW (SB 114, 2023)** which requires that the Williams uniform complaint procedure be used to address a complaint related to teacher misassignment that claims that a teacher who lacks credentials or training to teach English learners is assigned to teach a class with one or more English learners in the class, (formerly with more than 20 percent English learners in the class).

Exhibit(2) 1312.4 - Williams Uniform Complaint Procedures

Exhibit updated to reflect **NEW LAW (SB 114, 2023)** which requires that the Williams uniform complaint procedure be used to address a complaint related to teacher misassignment that claims that a teacher who lacks credentials or training to teach English learners is assigned to teach a class with one or more English learners in the class, (formerly with more than 20 percent English learners in the class), and **NEW LAW (SB 760, 2023)** which authorizes districts to temporarily close a restroom for a documented student safety concern, an immediate threat to student safety, or to repair the facility. Exhibit also updated to reflect **NEW LAW (AB 1078, 2023)** which provides that complaints related to instructional materials alleging that more than one student does not have sufficient textbooks or instructional materials as the result of an act by the Governing Board, or the Board's failure to remedy the deficiency, may be filed with the Superintendent of Public Instruction directly.

Board Policy 5145.3 - Nondiscrimination/Harassment

Policy updated to reflect **NEW LAW (AB 1078, 2023)** which (1) requires that the district's policy prohibiting discrimination, harassment, intimidation, and bullying include a statement that the policy applies to all acts of the Governing Board and the Superintendent in enacting policies and procedures that govern the district, and (2) clarifies when it is unlawful discrimination for the Board to refuse to approve the use or prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library. Policy also updated to provide that all allegations of unlawful discrimination in district programs and activities shall be brought, investigated, and resolved in accordance with the district's uniform complaint procedures. Additionally, policy updated to reflect **NEW U.S. DEPARTMENT OF EDUCATION OFFICE FOR CIVIL RIGHTS GUIDANCE** documents which (1) state that a district may not separate students based on race, but may include group discussions or activities that focus on race as part of the curriculum, courses, or programs so long as access or participation is not permitted or limited based on race, (2) provide that a school-sponsored program with emphasis on race, such as a student club, that is open to all students, typically would not violate Title VI solely because of its race-related theme, and (3) address discrimination in the use of discipline based on disability, race, and gender expression.

Board Policy 6143 - Courses of Study

Policy updated to expand the list of characteristics for which the district may not, on the basis of the student's actual or perceived characteristic, provide any course separately or require or refuse participation by any student, to more closely align with law.

Administrative Regulation 6143 - Courses of Study

Regulation updated to reflect **NEW LAW (AB 1078, 2023)** which (1) includes people of all genders (formerly "men and women"), Latino Americans (formerly "Mexican Americans"), LGBTQ+ Americans (formerly "lesbian, gay, bisexual, and transgender Americans"), and members of other ethnic, cultural, religious, and socioeconomic status groups (formerly "ethnic and cultural") to the groups for which

instruction in social studies is required to include a study of the role and contributions of. Regulation also updated to reflect the requirement for districts that offer a health education course to middle or high school students to include in such course mental health instruction.

Board Policy 6161.1 - Selection and Evaluation of Instructional Materials

Policy updated to reflect **NEW LAW (AB 1078, 2023)** which (1) requires the California Department of Education (CDE) to issue, by July 1, 2025, guidance regarding how to review instructional materials to ensure that they represent diverse perspectives and are culturally relevant, (2) requires CDE to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum, (3) requires the Governing Board to submit a copy of any resolution reflecting a finding of insufficient textbooks or other instructional materials to the County Superintendent of Schools no later than three business days after the hearing on such materials, (4) clarifies when it is unlawful discrimination for the Board to refuse to approve the use or prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library, and (5) provides that complaints alleging discrimination related to the use or prohibited use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library may be brought under the district's uniform complaint procedures or may be directly filed with the Superintendent of Public Instruction, as specified. Policy also updated to expand the list in the first philosophical statement regarding the Governing Board's desires for the district's instructional materials; clarify that instructional materials for mathematics and English language arts that are aligned to common core academic content standards are deemed to be aligned to state academic content standards adopted by the State Board of Education, move up the statement regarding the inclusion of the degree to which every student has sufficient access to standards-aligned instructional materials into the district's local control and accountability plan, and provide that the district shall take any action to ensure that each student has sufficient materials within two months of the beginning of the school year if the County Superintendent makes the district aware of a school that does not have sufficient instructional materials.

Administrative Regulation 6161.1 - Selection and Evaluation of Instructional Materials

Regulation updated to add that instructional materials being piloted by the district assess the extent to which the materials accurately reflect and value society's diversity. Regulation also updated to reflect **NEW LAW (AB 1078, 2023)** which includes people of all genders (formerly "men and women"), Latino Americans (formerly "Mexican Americans"), LGBTQ+ Americans (formerly "lesbian, gay, bisexual, and transgender Americans"), and members of other ethnic, cultural, religious, and socioeconomic status groups (formerly "ethnic and cultural") to the groups for which instruction in social studies is required to include a study of the role and contributions of, and (2) requires the California Department of Education to issue, by July 1, 2025, guidance regarding how to review instructional materials to ensure that they represent diverse perspectives and are culturally relevant. Additionally, regulation updated to include, for instructional materials being recommended for adoption by the Governing Board, that they include specified subject content requirements, support the district's local control and accountability plan, stimulate exploration of ideas and intellectual exchanges, and include options for materials in digital format.

Exhibit(1) 6161.1 - Selection and Evaluation of Instructional Materials

Exhibit updated to clarify that districts who have determined that sufficient materials were not provided to students at a district school(s) in a certain subject(s), should complete the section "Finding of Insufficient Textbooks or Instructional Materials in One or More Subjects" in addition to the section "Finding of Sufficient Textbooks or Instructional Materials." Exhibit also updated to separate out section regarding "Finding of Available Science Laboratory Equipment for Grades 9-12," and to clarify the definition of "sufficient textbooks or instructional materials" in regard to materials in digital format. Additionally, Exhibit updated to reflect **NEW LAW (AB 1078, 2023)** which requires the Governing Board to submit a copy of any resolution reflecting a finding of insufficient textbooks or other instructional materials to the County Superintendent of Schools no later than three business days after the hearing on such materials.

Board Policy 6161.11 - Supplementary Instructional Materials

Policy updated to reflect **NEW LAW (AB 1078, 2023)** which clarifies when it is unlawful discrimination for the Governing Board to refuse to approve the use or prohibit the use of any textbook, instructional material,

supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library, (2) requires the California Department of Education (CDE) to issue, by July 1, 2025, guidance regarding how to review instructional materials to ensure that they represent diverse perspectives and are culturally relevant, (3) requires CDE to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum, and (4) provides that complaints alleging discrimination related to the use or prohibited use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library may be brought under the district's uniform complaint procedures or may be directly filed with the Superintendent of Public Instruction, as specified. Policy also updated to delete the section "Supplementary Materials Aligned with Common Core Standards" as these interim materials are no longer necessary since the State Board of Education has adopted K-8 textbooks and instructional materials aligned to the Common Core Standards. Additionally, policy updated to include factual accuracy and whether the material contains pervasive vulgarity or profanity in the determination of compliance of supplemental materials with district criteria; and, add that the Superintendent or designee may provide training to administrators and teachers in the selection and evaluation of supplementary instructional materials, including the criteria to be utilized and applicable legal considerations.

Board Policy 6163.1 - Library Media Centers

Policy updated to expand the first philosophical paragraph regarding the Governing Board's recognition of how school libraries support the educational program and the Board's desire for books and other resources that are stocked in school libraries. Policy also updated to reflect **NEW LAW (AB 1078, 2023)** which clarifies when it is unlawful discrimination for the Board to refuse to approve the use or prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library, (2) requires the California Department of Education (CDE) to issue, by July 1, 2025, guidance regarding how to review instructional materials to ensure that they represent diverse perspectives and are culturally relevant, (3) requires CDE to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum, and (4) provides that complaints alleging discrimination related to the use or prohibited use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library may be brought under the district's uniform complaint procedures or may be directly filed with the Superintendent of Public Instruction, as specified. Additionally, policy updated in regard to the criteria for evaluation of the condition and use of school libraries to add (1) that the quality of the collection at each library include types of materials (fiction, non-fiction, newspapers, magazines, encyclopedias, materials in other languages, and reference materials), alignment with curriculum, and provision of a broad spectrum of knowledge and viewpoints, and (2) that principals, teachers, and library personnel have knowledge of the process to follow when a library material(s) is challenged.

Policy 1160: Political Processes

Status: ADOPTED

Original Adopted Date: 02/01/1996 | **Last Revised Date:** 03/09/01/2011/2023 | **Last Reviewed Date:** 03/09/01/2011/2023

CSBA NOTE: The following optional policy addresses political activities conducted by members of the Governing Board or district staff acting on behalf of the district. It does not apply to individuals acting as private citizens on their own time and at their own expense. When acting as private citizens, individuals have broad rights under the First Amendment to engage in political activities, including taking positions on electoral measures and candidates and establishing and participating in political action committees.

Education Code 7055 authorizes the district to establish reasonable regulations related to employees engaging in political activity. See BP/AR 4119.25/4219.25/4319.25 - Political Activities of Employees for language implementing this statute as well as language regarding activities by employee organizations.

The Governing Board has a responsibility to actively advocate fiscal and public policy that supports the district's schools and the children in the community. The Board shall be proactive in defining the district's advocacy agenda based on the district's vision and goals and the needs of the district and community. The Board's advocacy efforts shall be conducted in accordance with legal requirements.

Ballot Measures/Candidates

No district funds, services, supplies, or equipment shall be used to urge the support or defeat of any ballot measure or candidate, including any candidate for election to the Board. (Education Code 7054)

CSBA NOTE: Whether an activity is an appropriate use of public funds or an impermissible campaign activity is a complicated analysis. In *Vargas v. City of Salinas*, the California Supreme Court created three categories of activities: (1) permissible informational activities, such as resolutions and providing objective analysis; (2) impermissible campaign activities, such as producing or distributing literature that urges a voter to act a certain way; or (3) unclear activities which do not fall into either group and must be analyzed looking at the "style, tenor, and timing" of the activity. The following two paragraphs reflect the court's analysis of permissible activities. ~~District~~ [CSBA's District and County Office of Education Legal Services or district](#) legal counsel should be consulted when there is a question as to whether an activity is permissible.

The Board may discuss and study the potential effect of proposed or qualified ballot measures on the district's schools at an open and agendaized Board meeting. The Board's discussion of the effect of such measures shall include an opportunity for staff and members of the public to speak on all sides of the issue. At that meeting, the Board may adopt a position or resolution in support of or in opposition to a ballot measure. The language in any resolution adopted by the Board shall not urge the public to take any action regarding the measure.

The Board's position on a ballot measure, including any resolution, shall be publicized only through normal district procedures and consistent with regular district practice for reporting Board actions. Such publicity shall be for informational purposes and shall not attempt to influence voters.

CSBA NOTE: Elections Code 9170, as added by AB 1416 (Ch. 751, Statutes of 2022), requires the ballot label or similar description of a school district measure, or other local government measure, on a county ballot to list, either as a supporter or an opponent of the measure, the associations, nonprofit organizations, businesses, or individuals, including current or former elected officials such as board members, who have signed the ballot argument or are listed in the text of the argument for or against the measure, unless the county board of supervisors elects not to list such supporters and opponents.

Individual School Board members may include their name in support of or opposition to a county, city, district, or school measure on a county ballot in accordance with Elections Code 9170.

CSBA NOTE: When it is unclear whether a campaign activity is permissible, the court will analyze the activity based on its "style, tenor and timing" to determine whether it involves an appropriate expenditure of public funds. Examples of things that a court might look for include how the material was distributed (i.e., special edition or regular publication), the language used in the publication (i.e., inflammatory or informational), and whether the distribution was consistent with regular district practice (i.e., regular circulation or special mailing). Districts should be cautious and ensure that any such informational material is an appropriate use of district funds.

The Superintendent or designee may use district resources to provide students, parents/guardians, and community members with fair and impartial information related to ballot measures, including information about the impact of ballot measures on the district. (Education Code 7054)

In preparing or distributing such informational material, the Superintendent or designee shall analyze the material to help ensure that it is an appropriate informational activity, provides a fair analysis of the issues, and does not advocate passage or defeat of a measure or candidate.

CSBA NOTE: In *Vargas v. City of Salinas*, the court offered examples of activities which would be impermissible campaign activities, as reflected in the following paragraph. In addition, 2 CCR 18901.1 prohibits the use of public funds for a newsletter or "mass mailing" which expressly advocates the election or defeat of a ballot measure or candidate or, when taken in context, urges a particular result. Because violation of this regulation could result in enforcement action by the Fair Political Practices Commission (FPPC), districts should proceed with caution and consult with CSBA's District and County Office of Education Legal Services or district legal counsel, as appropriate.

District resources, including email or computer systems, shall not be used to disseminate campaign literature. In addition, district resources shall not be used to purchase advertisements, bumper stickers, posters, or similar promotional items that advocate an election result or urge voters to take any action in support of or in opposition to a measure.

CSBA NOTE: Both the courts (*Santa Barbara County Coalition Against Automobile Subsidies v. Santa Barbara County Association of Governments*) and the Attorney General (88 Ops.Cal.Atty.Gen. 46 (2005)) have provided guidance as to the appropriate use of district funds when the district is preparing to submit a bond proposal to the voters for approval. The key distinction is whether the action is taken before or after the measure has been placed on the ballot and whether the activity is directed at swaying voters. Permissible expenditures include researching the need for the measure, formulating and drafting the proposal, and conducting polling and focus groups to assess the feasibility of the measure. Impermissible activities include recruiting and organizing supporters

for a campaign, raising funds for the campaign, or hiring a consultant to develop a strategy for building support for the measure.

Political activity related to district bond measures shall, in addition to the above, be subject to the following conditions:

1. The Superintendent or designee may research, draft, and prepare a district bond measure or other initiative for the ballot, but shall not use district resources to influence voters or otherwise campaign for the measure.
2. Upon request, Board members and district administrators may appear at any time before a citizens' group to explain why the Board called for an election on a bond measure and to answer questions. (Education Code 7054.1)

If the presentation occurs during working hours, the employee representing the district shall not urge a citizens' group to vote for or against the bond measure.

3. The Board or any individual Board member may file a written argument for the ballot that is either for or against any school measure. (Elections Code 9501)

Legislation

CSBA NOTE: Pursuant to Government Code 53060.5, the district may engage in legislative activities and lobbying, either directly or through a representative, and the cost of this activity is an appropriate use of district funds. Lobbying activities are regulated by the FPPC (2 CCR 18600-18640) and governed by the Political Reform Act (Government Code 81000-91015).

The Board's responsibility as an advocate for the district may include lobbying and outreach at the state, national, and local levels. The Board and Superintendent or designee shall work to establish and maintain ongoing relationships with elected officials, community leaders, and the media in order to communicate district positions and concerns.

The Board and Superintendent shall develop an advocacy action plan to define expectations and responsibilities. This plan may include, but is not limited to, legislative priorities, strategies for outreach to the media and community, development of key messages and talking points, and adoption of positions on specific legislation, regulations, or budget proposals.

In order to strengthen legislative advocacy efforts, the district may work with organizations and coalitions and may join associations whose representatives lobby on behalf of their members in accordance with Government Code 53060.5.

CSBA NOTE: Although the district has the authority to lobby the legislature, it cannot use district resources to urge the public to lobby the legislature on its behalf. In *Miller v. Miller* the court concluded that urging the public was impermissible election campaigning because the activity was directed to the public and not the legislature.

The district may provide fair and impartial information about legislative issues affecting schools and children and shall inform the community about its advocacy activities. However, informational materials about legislation shall not urge the public to lobby the legislature, Governor, or state agencies on behalf of the district.

CSBA NOTE: An appellate court held in *League of Women Voters v. Countywide Criminal Justice Coordination Committee* that the drafting of legislative proposals was a permissible use of public funds since it was more similar to the exercise of a local agency's governing authority than a campaign activity.

As necessary, the Board may direct the Superintendent or designee to draft legislative or regulatory proposals which serve the district's interests.

Legal Advocacy

CSBA NOTE: When an issue requires resolution in the courts rather than through legislation, it is permissible for districts to use public funds to initiate or participate in legal advocacy. Toward these ends, districts may choose to join with other districts in a group, such as CSBA's Education Legal Alliance which funds and supports litigation in cases of statewide significance to its members.

The Board recognizes that some issues are more appropriately addressed judicially rather than legislatively. When a legal issue is likely to set a state or national precedent, the district may join with other districts or parties in order to resolve the issue through litigation or other appropriate means.

Political Forums

Forums on political issues may be held in district facilities as long as the forum is made available to all sides of the issue on an equitable basis. (Education Code 7058)

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Policy Reference Disclaimer:

These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State	Description
2 CCR 18600-18640	Lobbyists
2 CCR 18901.1	Campaign related mailings sent at public expense
Ed. Code 35160	Authority of governing boards
Ed. Code 35172	Promotional activities
Ed. Code 7050-7058	Political activities of school officers and employees
Ed. Code 7054	Use of district property
Ed. Code 7054.1	Requested appearance
Ed. Code 7056	Soliciting or receiving political funds
<u>Elec. Code 9170</u>	<u>Ballot label; support and opposition listings</u>
Elec. Code 9501	School district elections; arguments for or against a measure
Gov. Code 53060.5	Attendance at legislative body; expenses
Gov. Code 54953.5	Audio or video recording of proceedings
Gov. Code 54953.6	Broadcasts of proceedings
Gov. Code 81000-91014	Political Reform Act

Gov. Code 82031	Definition of independent expenditure
Gov. Code 8314	Unlawful use of state resources
Management Resources	Description
Attorney General Opinion	73 Ops.Cal.Atty.Gen. 255 (1990)
Attorney General Opinion	88 Ops.Cal.Atty.Gen. 46 (2005)
Court Decision	Choice-in-Education League et al v. Los Angeles Unified School District; (1993) 17 Cal.App.4th 415
Court Decision	League of Women Voters v. Countywide Criminal Justice Coordination Committee; (1988) 203 Cal.App.3d 529
Court Decision	Miller v. Miller; (1978) 87 Cal.App.3d 762
Court Decision	Santa Barbara County Coalition Against Automobile Subsidies v. Santa Barbara County Association of Governments; (2008) 167 Cal.App.4th 1229
Court Decision	Stanson v. Mott; (1976) 17 Cal.-3d 206
Court Decision	Vargas v. City of Salinas; (2009) 46 Cal.-4th 1
Court Decision	Yes on Measure A v. City of Lake Forest; (1997) 60 Cal.App.4th 620
CSBA Publication	Legal Guidelines for Lobbying Activity, Fact Sheet, February 2011
CSBA Publication	Legal Guidelines: -Use of Public Resources for Ballot Measures and Candidates, Fact Sheet, February 2011
Institute for Local Government Publication	Legal Issues Associated with Use of Public Resources and Ballot Measure Activities, June 2010
Website	CSBA District and County Office of Education Legal Services
Website	Institute for Local Government
Website	Fair Political Practices Commission
Website	CSBA

Cross References

Code	Description
0000	Vision
0200	Goals For The School District
1000	Concepts And Roles
1100	Communication With The Public
1112	Media Relations
1114	District-Sponsored Social Media
1114	District-Sponsored Social Media

1325	Advertising And Promotion
1330	Use Of School Facilities
1330	Use Of School Facilities
1330-E(1)	Use Of School Facilities
1400	Relations Between Other Governmental Agencies And The Schools
4119.25	Political Activities Of Employees
4119.25	Political Activities Of Employees
4219.25	Political Activities Of Employees
4219.25	Political Activities Of Employees
4319.25	Political Activities Of Employees
4319.25	Political Activities Of Employees
7131	Relations With Local Agencies
7214	General Obligation Bonds
7214	General Obligation Bonds
9000	Role Of The Board
9010	Public Statements
9124	Attorney
9200	Limits Of Board Member Authority
9230	Orientation
9250	Remuneration, Reimbursement And Other Benefits
9250-E(1)	Remuneration, Reimbursement And Other Benefits
9320	Meetings And Notices
9321	Closed Session
9321-E(1)	Closed Session
9321-E(2)	Closed Session

Policy 1330: Use Of School Facilities

Status: ADOPTED

Original Adopted Date: 04/01/2013 | **Last Revised Date:** 07/09/01/20182023 | **Last Reviewed Date:** 07/09/01/20182023

CSBA NOTE: Education Code 38133 **mandates** that the Governing Board to develop rules and regulations related to the management, direction, and control of school facilities. Pursuant to Education Code 38130-38138 (the Civic Center Act), school facilities are civic centers and, under certain circumstances, members of the school community must be allowed to use them for specified purposes. In granting access for the use of school facilities to district residents and community groups, the Board must be careful to avoid discriminating against certain individuals, groups, or viewpoints and thereby violating constitutional requirements, including free speech rights. In *Good News Club v. Milford Central School*, the U.S. Supreme Court held that the school district violated the club's free speech rights when it denied the club's use of school facilities for after-school meetings because of the religious nature of the meetings.

The Governing Board believes that school facilities and grounds are a vital community resource which should be used to foster community involvement and development. Therefore, the Board authorizes the use of school facilities by district residents and community groups for purposes specified in the Civic Center Act, to the extent that such use does not interfere with school activities or other school-related uses.

The Superintendent or designee shall give priority to school-related activities in the use of school facilities and grounds. Other uses authorized under the Civic Center Act shall be on a first-come, first-served basis.

CSBA NOTE: Pursuant to Education Code 38133, the Board is **mandated** to develop rules and regulations which must include the items specified below for the management, direction, and control of school facilities.

For the effective management and control of school facilities and grounds, the Superintendent or designee shall maintain procedures and regulations that: (Education Code 38133)

1. Aid, encourage, and assist groups desiring to use school facilities for approved activities
2. Preserve order in school facilities and on school grounds and protect school facilities, ~~designating~~ including the designation of a person to supervise this task, if necessary
3. Ensure that the use of school facilities or grounds is not inconsistent with their use for school purposes and does not interfere with the regular conduct of ~~school work~~ schoolwork

CSBA NOTE: The following paragraph is optional and may be modified to reflect district practice.

Subject to prior approval by the Board, the Superintendent or designee may grant the use of school facilities or grounds on those days on which district schools are closed. (Education Code 37220)

There shall be no advertising on school facilities and grounds except as ~~allowed by district policy~~ specified in ~~BP~~ Board Policy 1325 - Advertising and Promotion.

CSBA NOTE: The following optional paragraph may be modified to reflect district practice. A district may enter into an agreement with another entity for the joint use of school facilities or

grounds. For considerations to guide the development of such an agreement, see BP 1330.1 - Joint Use Agreements.

As necessary to ensure efficient use of school facilities, the Superintendent or designee may, with the Board's approval, enter into an agreement for the joint use of any school facilities or grounds. The Board shall approve any such agreement only if it determines that it is in the best interest of the district and the community.

Fees

CSBA NOTE: Education Code 38134 authorizes districts to charge an amount "not ~~exceeding~~to exceed" direct costs for the use of school facilities or grounds by community groups and entities. 5 CCR 14037-14041 contain specific rules adopted by the State Board of Education for determining "direct costs" to be charged for use of school facilities and grounds. See the section "Calculating Direct Costs" below. If the district chooses to charge fees, 5 CCR 14041 requires the Board to adopt a fee schedule that specifies the hourly fee to be charged by the district either for specific school facilities and grounds or for types or categories of school facilities or grounds (e.g., all gymnasiums or playgrounds).

The Board shall adopt a comprehensive schedule of fees to be charged for community use of school facilities and grounds, including, but not limited to, the multipurpose room(s), playing or athletic field(s), track and field venue(s), tennis court(s), and outdoor basketball court(s). The schedule of fees shall be prepared in accordance with 5 CCR 14037-14041. (5 CCR 14041)

CSBA NOTE: Education Code 38134 **mandates** each district that chooses to charge the community a fee for the use of school facilities to adopt a policy specifying the activities and organizations that shall be subjected to the fees.

The options below provide suggestions on how districts that choose to charge fees may categorize activities and organizations for that purpose. Option 1 is for use by districts that choose to charge an amount "not ~~exceeding~~to exceed" direct costs to all community groups. Option 2 is for use by districts that choose to grant free use to nonprofit organizations and to groups organized to promote youth and school activities but charge other groups an amount "not ~~exceeding~~to exceed" direct costs. Option 3 is for use by districts that grant free use to school-related organizations only.

Regardless of the option chosen, there is an exception for the use of school facilities and grounds for religious services, as noted below.

No charge to nonprofit organizations and youth and school-oriented groups)

CSBA NOTE: This option reflects the common practice among districts to allow free use of school facilities by nonprofit organizations and clubs and associations that promote youth and school activities pursuant to Education Code 38134. Districts that wish to allow free use by some groups but charge other groups should proceed cautiously and ensure that such free use or discount is granted on a reasonable and nondiscriminatory basis. It is strongly recommended that districts

consult [CSBA's District and County Office of Education Legal Services or district](#) legal counsel before deciding which groups will or will not be charged and, based upon legal counsel's advice, decide whether it would be appropriate to specifically name in the district's policy the community groups that will or will not be charged.

The Board authorizes the use of school facilities or grounds, without charge, by nonprofit organizations and by clubs or associations organized to promote youth and school activities, including, but not limited to, Girl Scouts, Boy Scouts, Camp Fire USA, YMCA, parent-teacher associations, school-community advisory councils, and recreational youth sports leagues that charge participants no more than an average of \$60 per month. Other groups that request the use of school facilities under the Civic Center Act shall be charged an amount ~~not exceeding~~ **to exceed** direct costs determined in accordance with 5 CCR 14037-14041. (Education Code 38134)

CSBA NOTE: The remainder of this section is for use by all districts regardless of the option chosen above.

Pursuant to Education Code 38134, [a district must charge "at least" direct costs](#) to any group ~~authorized to use~~ **using** school facilities for religious services ~~must be~~ **even if the district selects Option 2 or Option 3 above and does not charge other groups. However, this may conflict with the U.S. Supreme Court's ruling in Good News Club v. Milford Central School, which held that a district's refusal to let a Christian club hold after-school meetings because of its religious nature, while permitting other secular character-building clubs to meet, constituted impermissible viewpoint discrimination under the First Amendment. Due to the potential conflict between this case and state law, districts should take caution in selecting Option 2 or Option 3 above or adopting a policy that charges religious groups direct costs when those costs are not charged "at least" direct costs to other groups. Districts are advised to consult with CSBA's District and County Office of Education Legal Services or district legal counsel with questions about charging religious groups for use of district facilities.**

Additionally, when any use of school facilities or grounds is for religious services, the district shall charge an amount at least equal to the district's direct costs. (Education Code 38134)

CSBA NOTE: Education Code 38134 requires the district to charge fair rental value when facilities are used for fundraising activities which are not beneficial to youth, public school activities, or charitable purposes, under the conditions specified below. "Fair rental value" is defined as direct costs plus the amortized costs of the school facilities or grounds used for the duration of the activity.

Groups shall be charged fair rental value when using school facilities or grounds for entertainment or meetings where admission is charged or contributions solicited and net receipts are not to be expended for charitable purposes or for the welfare of the district's students. (Education Code 38134)

Calculating Direct Costs

Direct costs to be charged for community use of each, or each type of, school facility or grounds shall be calculated in accordance with 5 CCR 14038 and may reflect the community's proportionate share of the following costs: (Education Code 38134; 5 CCR 14038-14041)

1. Capital direct costs calculated in accordance with 5 CCR 14039, including the estimated costs of maintenance, repair, restoration, and refurbishment of non-classroom space school facilities or grounds
2. Operational direct costs calculated in accordance with 5 CCR 14040, including estimated costs of supplies, utilities, janitorial services, other services performed by district employees and/or contracted workers, and salaries and benefits paid to district employees directly associated with the administration of the Civic Center Act to operate and maintain school facilities and grounds

CSBA NOTE: The following optional paragraph applies to districts that choose to discount direct cost fees based on the type or category of the applicant, such as to groups with tax-exempt status as authorized pursuant to 5 CCR 14041.

Direct cost fees shall not be discounted to any group or organization except when the discount is specifically authorized in the adopted fee schedule. (5 CCR 14041)

Expending Funds Collected as Capital Direct Costs

Any funds collected as capital direct costs shall be deposited into a special fund to be used only for capital maintenance, repair, restoration, and refurbishment of school facilities and grounds. (5 CCR 14042)

Use of School Facility as Polling Place

CSBA NOTE: Pursuant to Elections Code 12283, an elections official requesting the use of a school building as a polling place or vote center must include in his/~~her~~the request a list of the schools needed. Such requests must be made within sufficient time before the start of the school year so that the Board can determine and notify parents/guardians whether (1) the school will remain in session on those days, (2) the school day will be designated for staff training and development, or (3) the school will be closed to students and nonclassified employees. See BP 6111 - School Calendar.

The Board may authorize the use of school buildings as polling places ~~on any~~, or vote centers for election day, ~~and~~. The Board may also authorize the use of school buildings, without cost, for the storage of voting machines and other vote-tabulating devices. However, if a city or county elections official specifically requests the use of a school building as a polling place, or vote center on election day and/or during the 10 days preceding election day, as well as during key dates necessary for drop-off, set-up, and pick-up of election materials, as determined by the elections official, the Board shall allow its use for such purpose. If school will be in session, the Superintendent or designee shall identify to elections officials the specific areas of the school buildings not occupied by school activities that will be allowed for use as a polling place. ~~place~~ or vote center. (Elections Code 12283)

When a school is used as a polling place or vote center, the Superintendent or designee shall provide the elections official a site with an adequate amount of space that will allow the precinct board to perform its duties in a manner that will not impede, interfere, or interrupt the normal process of voting and shall make a telephone line for Internet access available for use by local elections officials if so requested. ~~He/she~~The Superintendent or designee shall make a reasonable

effort to ensure that the site is accessible to persons with disabilities. (Elections Code 12283)

The Superintendent or designee shall establish procedures to ensure student safety and minimize disruptions whenever school is in session while the facilities are being used as a polling place:
[or vote center.](#)

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Policy Reference Disclaimer:

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State	Description
5 CCR 14037-14042	Proportionate direct costs for use of school facilities and grounds
Bus. Code 25608	Alcohol on school property; use in connection with instruction
Ed. Code 10900-10914.5	Community recreation programs
Ed. Code 32280-32289.5	School safety plans
Ed. Code 37220	School holidays
Ed. Code 38130-38138	Civic Center Act; use of school property for public purposes
Ed. Code 51860	Time and facilities for bicycle and scooter safety instruction
Elec. Code 12283	Polling places; schools
Gov. Code 54950-54963	The Ralph M. Brown Act
M&V Code 1800	Definitions
Federal	Description
20 USC 7905	Equal access to public school facilities
40 CFR 141.1-141.723	Drinking water standards
Management Resources	Description
Attorney General Opinion	79 Ops.Cal.Atty.Gen. 248 (1996)
Attorney General Opinion	82 Ops.Cal.Atty.Gen. 90 (1999)
Court Decision	Ellis v. Board of Education; (1945) 27 Cal.2d 322
Court Decision	Good News Club v. Milford Central School; (2001) 533 U.S. 98
Court Decision	Lamb's Chapel v. Center Moriches Union Free School District; (1993) 508 U.S. 384
Court Decision	ACLU v. Board of Education of Los Angeles; (1961) 55 Cal .2d 167

Court Decision	Cole v. Richardson, (1972) 405 U.S. 676
Court Decision	Connell v. Higgenbotham, (1971) 403 U.S. 207
CSBA Publication	Building Healthy Communities: A School Leader's Guide to Collaboration and Community Engagement, 2009 https://www.csba.org/~media/4D07909373B14A0BB5CA2CCF41F98351.ashx
CSBA Publication	Maximizing Opportunities for Physical Activity Through Joint Use of Facilities, Policy Brief, February 2010 https://www.csba.org/EducationIssues/EducationIssues/~/-/media/Files/EducationIssues/Wellness/201002_JointUse_PolicyBrief.ashx
Website	CSBA District and County Office of Education Legal Services
Website	California Department of Education
Website	CSBA

Cross References

Code	Description
0410	Nondiscrimination In District Programs And Activities
0450	Comprehensive Safety Plan
0450	Comprehensive Safety Plan
0470	COVID-19 Mitigation Plan
1000	Concepts And Roles
1160	Political Processes
1230	School-Connected Organizations
1230	School-Connected Organizations
1325	Advertising And Promotion
1330.1	Joint Use Agreements
1400	Relations Between Other Governmental Agencies And The Schools
3280	Sale Or Lease Of District-Owned Real Property
3280	Sale Or Lease Of District-Owned Real Property
3513.3	Tobacco-Free Schools
3513.3	Tobacco-Free Schools
3513.4	Drug And Alcohol Free Schools
3515.2	Disruptions
3515.2	Disruptions
3515.21	Unmanned Aircraft Systems (Drones)
3516	Emergencies And Disaster Preparedness Plan

3516	Emergencies And Disaster Preparedness Plan
3530	Risk Management/Insurance
3530	Risk Management/Insurance
4119.25	Political Activities Of Employees
4119.25	Political Activities Of Employees
4219.25	Political Activities Of Employees
4219.25	Political Activities Of Employees
4319.25	Political Activities Of Employees
4319.25	Political Activities Of Employees
5148	Child Care And Development
5148	Child Care And Development
5148.2	Before/After School Programs
5148.2	Before/After School Programs
5148.3	Preschool/Early Childhood Education
5148.3	Preschool/Early Childhood Education
6111	School Calendar
6115	Ceremonies And Observances
6115	Ceremonies And Observances
6141.2	Recognition Of Religious Beliefs And Customs
6141.2	Recognition Of Religious Beliefs And Customs
6145	Extracurricular And Cocurricular Activities
6145	Extracurricular And Cocurricular Activities
6145.5	Student Organizations And Equal Access
6145.5	Student Organizations And Equal Access
7160	Charter School Facilities
7160	Charter School Facilities
9320	Meetings And Notices

Regulation 1330: Use Of School Facilities

Status: ADOPTED

Original Adopted Date: 07/01/2018 | **Last Reviewed Date:** 07/01/2018 **2023**

CSBA NOTE: The following administrative regulation is **mandated** for the management, direction, and control of school facilities, pursuant to Education Code 38133.

Application for Use of Facilities

CSBA NOTE: Districts are encouraged to consult with CSBA's District and County Office of Education Legal Services or district legal counsel to create a facilities use application and agreement for the use of school facilities and grounds by any entity other than the district.

Any person applying for the use of any school facilities or grounds on behalf of any society, group, or organization shall present written authorization from the group or organization to make the application.

CSBA NOTE: The California Supreme Court has determined that the requirements of Education Code 38135 and 38136 are unconstitutional (*ACLU v. Board of Education of City of Los Angeles*). Although these provisions have not been repealed, districts are advised not to require any oath affirming that the group does not intend to take actions leading to the overthrow of the government.

Other types of oaths have been held constitutionally acceptable. The California Supreme Court upheld the use of an oath that the individual or group does not intend to use school premises to commit unlawful acts (*ACLU v. Board of Education*), and the U.S. Supreme Court has upheld affirmative loyalty oaths for public employees, expressing a promise to support the federal and state constitutions (*Connell v. Higgenbotham*; *Cole v. Richardson*). ~~The accompanying exhibit provides a sample facilities use statement.~~ The following paragraph is optional.

~~Persons or organizations applying for the use of school facilities or grounds shall submit a facilities use statement indicating that they uphold the state and federal constitutions and do not intend to use school premises or facilities to commit unlawful acts.~~ Anyone applying to use school facilities shall do so as specified in district procedures and in accordance with law.

Civic Center Use

Subject to district policies and regulations, school facilities and grounds shall be available to citizens and community groups as a civic center for the following purposes: (Education Code 32282, 38131, 51860)

1. Public, literary, scientific, recreational, educational, or public agency meetings
2. The discussion of matters of general or public interest

CSBA NOTE: ~~An~~The Attorney General ~~Opinion (opined in 79 Ops.Cal.Atty.Gen. 248 (1996)) found unconstitutional~~ that the section of Education Code 38131 which provides that a board may grant the use of school facilities to a religious group to conduct services only when the religious group has no other suitable meeting place: is unconstitutional. Although Attorney General opinions do not carry the force of law, they are given deference by the courts in the case of legal challenge.

Therefore, a district should consult [CSBA's District and County Office of Education Legal Services or district](#) legal counsel before requiring a religious organization to establish that it lacks another suitable meeting place for the conduct of its services in order to rent school facilities. In that same opinion, the Attorney General also determined that Education Code 38131 does not limit the renewability of the temporary use permit for school facilities by a religious organization. Thus, legal counsel should also be consulted before a district refuses to renew a temporary permit. Item #3 below is consistent with the Attorney General's interpretation of Education Code 38131.

3. The conduct of religious services for temporary periods, on a one-time or renewable basis, by any church or religious organization
4. Child care programs to provide supervision and activities for children of preschool and elementary school age
5. The administration of examinations for the selection of personnel or the instruction of precinct board members by public agencies
6. Supervised recreational activities, including, but not limited to, sports league activities [for youth](#) that are arranged for and supervised by entities, including religious organizations or churches, and in which youth may participate regardless of religious belief or denomination
7. A community youth center

CSBA NOTE: Pursuant to Education Code 32282, procedures to allow school facilities to be used by public agencies, such as the Red Cross, for mass care and welfare shelters during an emergency must be included in the comprehensive school safety plan. See AR 0450 - Comprehensive Safety Plan.

8. Mass care and welfare shelters during disasters or other emergencies affecting the public health and welfare
9. A ceremony, patriotic celebration, or related educational assembly conducted by a veterans' organization

9. A *veterans' organization* means the American Legion, Veterans of Foreign Wars, Disabled American Veterans, United Spanish War Veterans, Grand Army of the Republic, or other duly recognized organization of honorably discharged soldiers, sailors, or marines of the United States, or any of their territories. (Military and Veterans Code 1800)

[CSBA NOTE: To enable the district to provide students safety instruction related to using electric, motorized, or nonmotorized bicycles and scooters, Education Code 51860, as amended by AB 2028 \(Ch. 116, Statutes of 2022\), authorizes the Governing Board to assist local law enforcement, nonprofit associations or organizations specified in Education Code 38134, such as the Girls Scouts, Boys Scouts, and parent-teacher associations, and public agencies that provide such safety instruction, in providing safety instruction to district students.](#)

10. [Bicycle, scooter, electric bicycle, motorized bicycle, or motorized scooter safety instruction for district students by local law enforcement, public agencies, nonprofit associations, or organizations specified in Education Code 38134](#)

CSBA NOTE: Education Code 38131 allows the district to grant use of school facilities for other purposes as deemed appropriate. The district may add any other purposes approved by the Governing Board and not inconsistent with existing law.

10.11. Other purposes deemed appropriate by the Governing Board

Restrictions

CSBA NOTE: In adopting rules for the management and control of school facilities, districts must be careful to ensure that they do not impose restrictions that may violate constitutionally protected rights. Generally, court decisions have held that districts may not discriminate on the basis of a group's viewpoint, and thus the use of facilities should be granted on a neutral basis. In *Good News Club v. Milford Central School*, the U.S. Supreme Court held that a district which prohibited a religious club from using school facilities after school hours for activities for which it allowed other community groups to use the school facilities discriminated against the club on the basis of the club's religious viewpoint in violation of the First Amendment to the United States Constitution.

Because federal and state constitutional free speech issues may be involved when a district denies the use of school facilities to certain groups, it is strongly recommended that a district consult with CSBA's District and County Office of Education Legal Services or district legal counsel before doing so.

School facilities or grounds shall not be used for any of the following activities:

1. Any use by an individual or group for the commission of any crime or any act prohibited by law
2. Any use which is inconsistent with the use of school facilities for school purposes or which interferes with the regular conduct of school or school work
3. Any use which involves the possession, consumption, or sale of drugs or any restricted substances, including tobacco

CSBA NOTE: Pursuant to Business and Professions Code 25608, it is a misdemeanor to possess, consume, sell, give, or deliver any alcoholic beverage to any person in a school building or on school grounds unless a specified exception applies. One such exception is serving alcohol during a special event, pursuant to a license or permit obtained under the Alcohol Beverage Control Act, at district-owned facilities at a time when students are not present. For this purpose, "facilities" include, but are not limited to, office complexes, conference centers, or retreat facilities. Although Business and Professions Code 25608 allows this exception, the district should consult CSBA's District and County Office of Education Legal Services, district legal counsel, and/or risk management personnel when determining whether to allow alcohol on district property pursuant to this exception. When a district allows the use of its facilities or grounds for events that may involve the serving or consumption of alcoholic beverages, it is recommended that rules and/or limitations be established to minimize risks to the district and attendees at such events (e.g., requiring security guards and/or additional insurance, limiting the presence of alcoholic beverages to designated areas, limiting the types of beverages and/or how many drinks can be served at a time, specifying the time period during which alcoholic beverages may be served). Item #4 is optional and may be deleted or revised to reflect any limitations imposed on the facility user.

4. Any use which involves the possession, consumption, or sale of alcoholic beverages, except for special events approved by the Superintendent or designee pursuant to Business and

Professions Code 25608 which are covered by a special events permit pursuant to Division 9 of the Business and Professions Code and which will occur at a time when students are not on the grounds. Any such use of school facilities shall be subject to any limitations that may be necessary to reduce risks to the district and ensure the safety of participants, as determined by the Superintendent or designee. Applicable limitations shall be clearly stated in the facility use agreement to be signed by the user's representative.

CSBA NOTE: Districts may exclude certain facilities from community use for safety or security reasons. Such facilities might include (1) offices or computer rooms containing records and confidential information and (2) science rooms and other rooms containing hazardous chemicals or equipment that cannot be used safely without special knowledge or skills. The following paragraph is optional and may be revised to specify excluded facilities.

The district may exclude certain school facilities from nonschool use for safety or security reasons.

Damage and Liability

CSBA NOTE: Pursuant to Education Code 38134, a district is authorized to take the actions specified in the following optional paragraph when damage to school facilities or grounds occurs from use by a nonprofit group, organization, club, or association that promotes youth and school activities.

Groups, organizations, or persons using school facilities or grounds shall be liable for any property damage caused by the activity. The district may charge the amount necessary to repair the damages and may deny the group further use of school facilities or grounds. (Education Code 38134)

CSBA NOTE: Education Code 38134 distinguishes the liability and insurance obligations of nonprofit groups, clubs, and associations that promote youth and school activities from those of the district. The district is liable for any injuries resulting from its negligence in the ownership and maintenance of its facilities and grounds and must bear the cost of insuring against these risks and defending itself from related claims.

Any group or organization using school facilities or grounds shall be liable for any injuries resulting from its negligence during the use of district facilities or grounds. The group shall bear the cost of insuring against this risk and defending itself against claims arising from this risk. (Education Code 38134)

Groups or organizations shall provide the district with evidence of insurance against claims arising out of the group's own negligence when using school facilities. (Education Code 38134)

CSBA NOTE: Pursuant to Education Code 38134, groups that promote youth and school activities cannot be required to sign hold harmless and indemnification agreements agreeing to defend and indemnify the district against liability arising during the group's use of school facilities to the extent that the agreement requires the group to assume liability for the district's negligence. The statute is unclear as to whether the district can require non-youth-related groups to indemnify the district from any and all injuries resulting from the use of the facilities. Districts wishing to create such an agreement should consult [CSBA's District and County Office of Education Legal Services or district](#) legal counsel.

Because hold harmless agreements are only as strong as the groups' credit, districts should generally require proof of insurance in addition to such agreements. When a hold harmless and indemnification agreement appears necessary for any specific school facilities or a specific event, the district's risk manager, insurance carrier, or legal counsel should tailor it to the situation.

As When permitted by law, the Superintendent or designee may shall require a hold harmless agreement and indemnification when warranted by the type of activity or the specific facilities being used.

Policy Reference UPDATE Service

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Policy Reference Disclaimer:

These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State	Description
5 CCR 14037-14042	Proportionate direct costs for use of school facilities and grounds
Bus. Code 25608	Alcohol on school property; use in connection with instruction
Ed. Code 10900-10914.5	Community recreation programs
Ed. Code 32280-32289.5	School safety plans
Ed. Code 37220	School holidays
Ed. Code 38130-38138	Civic Center Act; use of school property for public purposes
Ed. Code 51860	Time and facilities for bicycle and scooter safety instruction
Elec. Code 12283	Polling places; schools Polling places; schools
Gov. Code 54950-54963	The Ralph M. Brown Act
M&V Code 1800	Definitions
Federal	Description
20 USC 7905	Equal access to public school facilities
40 CFR 141.1-141.723	Drinking water standards
Management Resources	Description
Attorney General Opinion	79 Ops.Cal.Atty.Gen. 248 (1996)
Attorney General Opinion	82 Ops.Cal.Atty.Gen. 90 (1999)
Court Decision	Ellis v. Board of Education; (1945) 27 Cal.2d 322
Court Decision	Good News Club v. Milford Central School; (2001) 533 U.S. 98
Court Decision	Lamb's Chapel v. Center Moriches Union Free School District; (1993) 508 U.S. 384
Court Decision	ACLU v. Board of Education of Los Angeles; (1961) 55 Cal .2d 167

Court Decision	Cole v. Richardson, (1972) 405 U.S. 676
Court Decision	Connell v. Higgenbotham, (1971) 403 U.S. 207
CSBA Publication	Building Healthy Communities: A School Leader's Guide to Collaboration and Community Engagement, 2009 https://www.csba.org/~media/4D07909373B14A0BB5CA2CCF41F98351.ashx
CSBA Publication	Maximizing Opportunities for Physical Activity Through Joint Use of Facilities, Policy Brief, February 2010 https://www.csba.org/EducationIssues/EducationIssues/~/-/media/Files/EducationIssues/Wellness/201002_JointUse_PolicyBrief.ashx
Website	CSBA District and County Office of Education Legal Services
Website	California Department of Education
Website	CSBA

Cross References

Code	Description
0410	Nondiscrimination In District Programs And Activities
0450	Comprehensive Safety Plan
0450	Comprehensive Safety Plan
0470	COVID-19 Mitigation Plan
1000	Concepts And Roles
1160	Political Processes
1230	School-Connected Organizations
1230	School-Connected Organizations
1325	Advertising And Promotion
1330.1	Joint Use Agreements
1400	Relations Between Other Governmental Agencies And The Schools
3280	Sale Or Lease Of District-Owned Real Property
3280	Sale Or Lease Of District-Owned Real Property
3513.3	Tobacco-Free Schools
3513.3	Tobacco-Free Schools
3513.4	Drug And Alcohol Free Schools
3515.2	Disruptions
3515.2	Disruptions
3515.21	Unmanned Aircraft Systems (Drones)
3516	Emergencies And Disaster Preparedness Plan

3516	Emergencies And Disaster Preparedness Plan
3530	Risk Management/Insurance
3530	Risk Management/Insurance
4119.25	Political Activities Of Employees
4119.25	Political Activities Of Employees
4219.25	Political Activities Of Employees
4219.25	Political Activities Of Employees
4319.25	Political Activities Of Employees
4319.25	Political Activities Of Employees
5148	Child Care And Development
5148	Child Care And Development
5148.2	Before/After School Programs
5148.2	Before/After School Programs
5148.3	Preschool/Early Childhood Education
5148.3	Preschool/Early Childhood Education
6111	School Calendar
6115	Ceremonies And Observances
6115	Ceremonies And Observances
6141.2	Recognition Of Religious Beliefs And Customs
6141.2	Recognition Of Religious Beliefs And Customs
6145	Extracurricular And Cocurricular Activities
6145	Extracurricular And Cocurricular Activities
6145.5	Student Organizations And Equal Access
6145.5	Student Organizations And Equal Access
7160	Charter School Facilities
7160	Charter School Facilities
9320	Meetings And Notices

Regulation 3311: Bids

Status: ADOPTED

Original Adopted Date: 10/01/2015 | **Last Revised Date:** ~~12/09/01/2016~~2023 | **Last Reviewed Date:** ~~12/09/01/2016~~2023

CSBA NOTE: Pursuant to Government Code 54202, districts are **mandated** to establish bidding procedures governing the purchase of equipment and supplies. The following administrative regulation reflects the competitive bidding procedures applicable to these purchases, as well as contracts for certain services, public works projects, and repairs and maintenance, when the contract exceeds the amount specified in law.

An alternative procedure for public works projects is provided pursuant to the Uniform Public Construction Cost Accounting Act (UPCCAA) (Public Contract Code 22000-22045), ~~as amended by AB 2249 (Ch. 169, Statutes of 2018)~~, which allows public projects of \$60,000 or less to be performed by district employees and public projects of \$200,000 or less to be awarded through an informal bidding process. See BP/AR 3311.1 - Uniform Public Construction Cost Accounting Procedures. Districts that have adopted the UPCCAA procedures should modify the following regulation to delete or revise conflicting provisions related to contracts for public works. Also see AR 3311.2 - Lease-Leaseback Contracts, AR 3311.3 - Design-Build Contracts, and AR 3311.4 - Procurement of Technological Equipment for procedures applicable to those contracts.

Advertised/Competitive Bids

The district shall advertise for any of the following: (Public Contract Code 20111)

1. A public project contract that involves an expenditure of \$15,000 or more, including a contract for construction, reconstruction, erection, alteration, renovation, improvement, painting, repainting, demolition, or repair work involving a district owned, leased, or operated facility

CSBA NOTE: For the contracts specified in ~~item~~Item #2a-c below, Public Contract Code 20111 requires the Superintendent of Public Instruction (SPI) to annually establish a bid limit that reflects U.S. Department of Commerce data. The following paragraph allows the amount to escalate automatically once the SPI has made the annual determination. For ~~2019~~2023, the bid limit is ~~\$92,600~~109,300.

2. A contract that exceeds the amount specified in law, as annually adjusted by the Superintendent of Public Instruction, for any of the following:
 - a. The purchase of equipment, materials, or supplies to be furnished, sold, or leased to the district
 - b. Services, not including construction services or special services and advice in accounting, financial, legal, or administrative matters
 - c. Repairs that are not a public project, including maintenance

Maintenance means routine, recurring, and usual work for preserving, protecting, and keeping a district facility operating in a safe, efficient, and continually usable condition for the intended purpose for which it was designed, improved, constructed, altered, or repaired. Maintenance includes, but is not limited to, carpentry, electrical, plumbing, glazing, and other craft work designed to preserve the facility, as well as repairs, cleaning, and other operations on machinery and other permanently attached equipment. Maintenance does not include painting, repainting, or decorating other than touchup, or among other types of work, janitorial or custodial services and protection provided by security forces. (Public Contract Code 20115)

Instructions and Procedures for Advertised Bids

The Superintendent or designee shall call for bids by placing a notice at least once a week for two weeks in a local newspaper of general circulation published in the district, or if no such newspaper exists, then in some newspaper of general circulation that is circulated in the county. The Superintendent or designee also may post the notice on the district's ~~web site~~[website](#) or through an electronic portal. The notice shall state the work to be done or materials or supplies to be furnished and the time and place and ~~web site~~[website](#) where bids will be opened. (Public Contract Code 20112)

CSBA NOTE: Pursuant to Public Contract Code 2600 all bid documents and construction contracts, when applicable, must contain a notice that the project is subject to the skilled and trained workforce requirements specified in Public Contract Code 2600-2603. Skilled and trained workforce requirements are required for lease-leaseback projects, design-build, and alternative design-build projects. Skilled and trained workforce is optional for all other construction delivery methods. See AR 3311.2 Lease-Leaseback Contracts and AR 3311.3 -- Design-Build Contracts for specific bidding requirements.

The notice shall contain the time, date, and location of any mandatory prebid conference, site visit, or meeting and details regarding when and where project documents, including the final plan and specifications, are available. Any such mandatory visit or meeting shall occur not less than five calendar days after the publication of the initial notice. (Public Contract Code [For lease-leaseback, design-build, and alternative design-build projects, the notice shall specify that the project is subject to skilled and trained workforce requirements.](#) (Education Code [17250.25, 17250.62, 17407.5](#); Public Contract Code [2600](#), 6610)

Bid instructions and specifications shall include the following requirements and information:

1. All bidders shall certify in writing the minimum, if not exact, percentage of post-consumer materials in products, materials, goods, or supplies offered or sold. (Public Contract Code 22152)
2. All bids for construction work shall be presented under sealed cover. The district may accept a bid that has been submitted electronically or on paper. (Public Contract Code 20111, 20112)

The bid shall be accompanied by a form of bidder's security, including either cash, a cashier's check payable to the district, a certified check made payable to the district, or a bidder's bond executed by an admitted surety insurer and made payable to the district. The security of unsuccessful bidders shall be returned in a reasonable period of time, but in no event

later than 60 days after the bid is awarded. (Public Contract Code 20111, 20112)

3. When a standardized proposal form is provided by the district, bids not presented on the standard form shall be disregarded. (Public Contract Code 20111.5)
4. Bids shall not be accepted after the advertised bid opening time, regardless of whether the bids are actually opened at that time. (Public Contract Code 20112)
5. When two or more identical lowest or highest bids are received, the Governing Board may determine by lot which bid shall be accepted. (Public Contract Code 20117)

CSBA NOTE: Public Contract Code 20103.8 specifies that, in those cases when the bid includes items that may be added to or deducted from the scope of the work in the contract, the bid solicitation must specify the method to be used to determine the lowest bid, as detailed below. Districts should consult with [CSBA's District and County Office of Education Legal Services or district](#) legal counsel, as appropriate, if they have questions regarding the applicability of this law.

6. If the district requires that the bid include prices for items that may be added to or deducted from the scope of work in the contract, the bid solicitation shall specify which one of the following methods will be used to determine the lowest bid. In the absence of such a specification, only the method provided in ~~item~~[Item](#) #6a below shall be used. (Public Contract Code 20103.8)
 - a. The lowest bid shall be the lowest total of the bid prices on the base contract without consideration of the prices on the additive or deductive items.
 - b. The lowest bid shall be the lowest total of the bid prices on the base contract and those additive or deductive items that were specifically identified in the bid solicitation as being used for the purpose of determining the lowest bid price.
 - c. The lowest bid shall be the lowest total of the bid prices on the base contract and those additive or deductive items that, when taken in order from a specifically identified list of those items in the solicitation, and added to or subtracted from the base contract, are less than or equal to a funding amount publicly disclosed by the district before the first bid is opened.

The lowest bid shall be determined in a manner that prevents any information that would identify any of the bidders or proposed subcontractors or suppliers from being revealed to the district before the ranking of all bidders from lowest to highest has been determined. (Public Contract Code 20103.8)

CSBA NOTE: For a bid to be successful, it must conform to bid specifications (i.e., it must be "responsive") and the bidder must be determined to be able to perform the work (i.e., ~~he/she~~[the bidder](#) must be "responsible" as defined in Public Contract Code 1103). There is no right to a due process hearing when the district has merely found the bid to be nonresponsive. However, the district must be careful in making a determination on the "nonresponsiveness" of a bid based on anything other than the documents submitted. To avoid any confusion, the district should provide clear and comprehensive bid specifications to bidders.

When rejecting the lowest responsive bid on the basis that the bidder is nonresponsive, the

district must inform the bidder of the evidence used when making the determination and afford him/her the bidder a hearing with the right to present evidence that he/she the bidder is responsible. (~~City of Inglewood-Los Angeles County Civic Center Authority v. Superior Court and Great West Contractors Inc. v. Irvine Unified School District~~).

7. In determining the lowest bid, the district shall consider only responsive bids that conform to bid specifications and are submitted by responsible bidders who have demonstrated trustworthiness, quality, fitness, capacity, and experience to satisfactorily perform the public works contract.
 - a. When a bid is determined to be nonresponsive, the Superintendent or designee shall notify the bidder and give him/her the bidder an opportunity to respond to the determination.
 - b. When the lowest bidder is determined to be nonresponsive, the Superintendent or designee shall notify the bidder of his/her the right to present evidence of his/her the bidder's responsibility at a hearing before the Board.
8. After being opened, all submitted bids become public records pursuant to Government Code 7920.530 and shall be made available for public review pursuant to law, Board policy, and administrative regulation.

Prequalification Procedure

CSBA NOTE: The following section is optional. Pursuant to Public Contract Code 20111.6, a district with average daily attendance (ADA) of 2,500 or greater is required to prequalify all general contractors and electrical, mechanical, and plumbing subcontractors for any public project of \$1 million, 000,000 or more, when the project uses or is reimbursed from School Facilities Program funds (Education Code 17070.10-17079.30) or other future state school bonds. A model prequalification questionnaire is available on the Department of Industrial Relations website.

Additionally, pursuant to Public Contract Code 20111.5, districts are permitted, but not required, to establish prequalification procedures for other contracts which, by law, require competitive bidding.

When required by law or the Board, the Superintendent or designee shall establish a uniform system for rating bidders on the basis of completed questionnaires and financial statements in order to determine the size of contracts on which each bidder is qualified to bid. For this purpose, the Superintendent or designee shall furnish prospective bidders a standardized prequalification questionnaire and financial record which, when completed, shall indicate a bidder's statement of financial ability and experience in performing public works. The bidder's information shall be verified under oath in the manner in which civil law pleadings are verified. The questionnaires and financial statements shall not be public records and shall not be open to public inspection. (Code of Civil Procedure 446; Public Contract Code 20111.5, 20111.6)

When any public project involves an expenditure of \$1,000,000 or more and is funded or reimbursed wholly or partly by the School Facilities Program funds or other future state school bond, the district shall prequalify prospective bidders either quarterly or annually. The prequalification shall be valid for one year and the following requirements shall apply: (Public Contract Code 20111.6)

1. Prospective bidders, including, but not limited to, prime, general engineering, and general building contractors and electrical, mechanical, and plumbing subcontractors, as defined in Public Contract Code 4113 or Business and Professions Code 7056 or 7057, as applicable, shall submit a standardized questionnaire and financial statement 10 or more business days, as determined by the district, before the date fixed for the public opening of sealed bids.
2. Prospective bidders shall be prequalified by the district five or more business days, as determined by the district, before the date fixed for the public opening of sealed bids.

If the project includes electrical, mechanical, or plumbing components that will be performed by electrical, mechanical, or plumbing contractors, the Superintendent or designee shall make available to all bidders a list of prequalified general contractors and electrical, mechanical, and plumbing subcontractors five or more business days, as determined by the district, before the date fixed for the public opening of sealed bids. ([Public Contract Code 20111.6](#))

For all other contracts requiring competitive bidding, the district may establish a procedure for prequalifying bidders on a quarterly basis and may authorize that prequalification be considered valid for up to one calendar year following the date of the initial prequalification. Prospective bidders for such contracts shall submit the questionnaire and financial statement at least five days before the date fixed for public opening of sealed bids and shall be prequalified by the district at least one day before the fixed bid-opening date. (Public Contract Code 20111.5)

Award of Contract

The district shall award each contract to the lowest responsible bidder, except in the following circumstances:

1. When the contract is for the procurement and/or maintenance of electronic data processing systems and supporting software, in which case the Board may contract with any one of the three lowest responsible bidders (Public Contract Code 20118.1)
2. When the contract is for any transportation service which involves an expenditure of more than \$10,000 and which will be made with any person or corporation other than a common carrier, municipally owned transit system, or a parent/guardian of a student who is to be transported, in which case the Board may contract with other than the lowest bidder (Education Code 39802)

CSBA NOTE: Pursuant to Public Contract Code 2000-2002, a district is permitted to establish bidding requirements that facilitate the participation of minority, women, disabled veteran, and small business enterprises in contracts. Though minorities and women are included in Public Contract Code 2000, Article 1, Section 31(a) of the California Constitution prohibits the granting of preferences based on race, sex, color, ethnicity, etc., or national origin in state employment and contracting. The district should consult [with CSBA's District and County Office of Education Legal Services or district](#) legal counsel if there is any question about the granting of preferences to any such business.

3. When the contract is one for which the Board has established goals and requirements relating to participation of disabled veteran or small business enterprises in accordance with Public Contract Code 2000-2002, in which case the Board may contract with the lowest responsible bidder who submits a responsive bid and complies or makes a good faith effort

to comply with the goals and requirements (Public Contract Code 2000-2002)

4. When procuring a lease-leaseback contract, in which case the Board shall award the contract based on objective criteria for determining the best combination of price and qualifications in accordance with Education Code 17400 and ~~1740~~(cf. 3311.2 - Lease-
~~Leaseback Contracts~~
17406)

CSBA NOTE: Until January 1, 2025, districts may, in accordance with Education Code 17250.25, utilize the design-build method of construction delivery. Pursuant to Education Code 17250.15, design-build means a project delivery process in which both the design and construction of a project are procured from a single entity.

5. When procuring a design-build contract for a public works project in excess of \$1,000,000 in accordance with Education Code 17250.20, in which case the Board may award the contract to either the low bid or the best value to the district, taking into consideration, at a minimum, price, technical design and construction expertise, and life-cycle costs (Education Code 17250.20, 17250.25)

CSBA NOTE: Pursuant to Education Code 17250.60-17250.69, as added by AB 185 (Ch. 571, Statutes of 2022), the district may, until January 1, 2029, utilize alternative design-build contracts for public works projects in excess of \$5,000,000. Pursuant to Education Code 17250.60, alternative design-build means a project delivery process in which both the design and construction of a project are procured from a single design-build entity based on its proposed design cost, general conditions, overhead, and profit as a component of the project price.

A contract for an alternative design-build project must be awarded to either the low bidder or the best value, and is subject to further negotiation and amendment pursuant to Education Code 17250.65. Alternative design-build subcontracts are subject to an open book evaluation by the district and the district sets the price based on this open book evaluation. The alternative design-build contract may be subject to further negotiation or amendment and if the district and the design-build entity are unable to reach an agreement, the district may terminate the contract. A district that utilizes the alternative design-build procurement method is required to submit, by January 1, 2028, a report to the Legislature, as specified in Education Code 17250.67. See AR 3311.3 – Design-Build Contracts for more information specific to design-build and alternative design-build projects.

6. When procuring an alternative design-build contract for a public works project in excess of \$5,000,000 in accordance with Education Code 17250.62, in which case the Board may award the contract to either the low bid or the best value, taking into consideration, at a minimum design cost, general conditions, overhead, and profit as a component of the project price; technical design and construction expertise; and life-cycle costs (Education Code 17250.61, 17250.62)

Protests by Bidders

CSBA NOTE: The law does not specify a procedure for handling protests by bidders. The following optional section provides one such procedure and should be modified to reflect district practice.

Alf the bidder may protest a bid award if he/she believes that the award is not in compliance with law, Board policy, or the bid specification, the bidder may protest the award. A protest must be filed

in writing with the Superintendent or designee within five working days after receipt of notification of the contract award and shall include all documents supporting or justifying the protest. A bidder's failure to file the ~~protest~~protested documents in a timely manner shall constitute a waiver of his/~~her~~the right to protest the award of the contract.

The Superintendent or designee shall review the documents submitted with the bidder's claims and render a decision in writing within 30 working days. The Superintendent or designee may also convene a meeting with the bidder in order to attempt to resolve the problem.

CSBA NOTE: The following paragraph provides a process for appealing a bid award to the Board. Although the law does not specify the notice to be given in this circumstance, CSBA recommends at least three business days which may be modified to reflect district practice.

The bidder may appeal the Superintendent or designee's decision to the Board. The Superintendent or designee shall provide notice to the bidder of the date and time for Board consideration of the protest at least three business days before the Board meeting. The Board's decision shall be final.

Limitation on Use of Sole Sourcing

CSBA NOTE: "Sole sourcing" is the practice by which one brand name product is specified, although comparable, competitive products are available. Public Contract Code 3400 allows sole sourcing in limited circumstances and requires that the specification of the designated product be followed by the words "or equal," so that bidders for such a contract are able to base their bids on the use of other products of equal functionality that may result in cost savings for the district. The following section is optional.

In any contract for the construction, alteration, or repair of school facilities, the Superintendent or designee shall ensure that the bid specification: (Public Contract Code 3002, 3400)

1. Does not directly or indirectly limit bidding to any one specific concern
2. Does not call for a designated material, product, thing, or service by a specific brand or trade name, unless the specification is followed by the words "or equal," so that bidders may furnish any equal material, product, thing, or service

In any such case, the bid specification shall provide a time period, before and/or after the award of the contract, for the contractor to submit data substantiating the request for substituting the designated material, product, thing, or service. If no such time period is specified, the contractor may submit the data within 35 days after the award of the contract.

CSBA NOTE: The following optional paragraph is for use by districts with ADA of more than 2,500. For the repair or replacement of the roof of a public facility, a material must meet the requirements specified below to be considered "equal" pursuant to Public Contract Code 3000-3010.

When the bid is for a roof project, a material, product, thing, or service is considered "equal" to that designated if it is equal in quality, durability, design, and appearance; will perform the intended function equally well; and conforms substantially to the detailed requirements in the bid specification. (Public Contract Code 3002)

However, the Superintendent or designee may designate a specific material, product, thing, or

service by brand or trade name (also known as sole sourcing), if the Board has made a finding, described in the invitation for bids or request for proposals (RFP), that a particular material, product, thing, or service is designated for any of the following purposes: (Public Contract Code 3400)

1. To conduct a field test or experiment to determine its suitability for future use
2. To match others in use on a particular public improvement that has been completed or is in the course of completion
3. To obtain a necessary item that is only available from one source
4. To respond to the Board's declaration of an emergency, as long as the declaration has been approved by four-fifths of the Board when issuing the invitation for bid or RFP

Bids Not Required

CSBA NOTE: The following paragraph lists those items that may be purchased through a "piggybacked" bid; see the accompanying Board policy. Many districts have used the piggyback procedure to purchase portable and relocatable buildings. The Attorney General has opined (in 89 Ops.Cal.Atty.Gen. 1, 2006) that a district may not rely on the piggyback exception to contract for the acquisition and installation of factory-built modular building components (i.e., roofs and walls) for installation on a permanent foundation. ~~However, this~~ This opinion does not apply to typical portable or relocatable single-classroom buildings, because they lack a permanent foundation and building mobility. Additionally, in 2022 the State Allocation Board (SAB) notified districts that modular school facilities must be competitively bid and districts that use piggyback contracts for modular facilities are ineligible for state funding from SAB administered programs. Districts considering using the piggyback process for relocatables, portables, modulares, and the like should consult district legal counsel. ~~While Attorney General opinions are not binding, they are often given deference by the court and may also be considered by the State Allocation Board when making funding decisions.~~ CSBA's District and County Office of Education Legal Services or district legal counsel.

Without advertising for bids and upon a determination that it is in the best interest of the district, the Board may authorize "piggyback" by authorizing another public corporation or agency, by contract, lease, requisition, or purchase order, to lease data-processing equipment or to purchase materials, supplies, equipment, automotive vehicles, tractors, and other personal property for the district in the manner that the other public corporation or agency is authorized to make the leases or purchases from a vendor ("~~piggyback~~"). Alternatively, if the public corporation or agency has an existing contract with a vendor for the lease or purchase of personal property, the district may authorize the lease or purchase of personal property directly from the vendor and make payments under the same terms that are available to the public corporation or agency under the contract. (Public Contract Code 20118)

CSBA NOTE: The following optional paragraph reflects the authority granted to public agencies pursuant to Government Code 4217.10-4217.18 to enter into energy service contracts without competitive bidding when the agency's governing body determines that the contract is in the best interest of the agency based on the ~~costs-benefits~~ cost-benefit analysis specified in Government Code 4217.12.

Without advertising for bids, the Board may enter into an energy service contract and any related facility ground lease, when it determines that the terms of the contract and lease are in the best

interest of the district and meet the cost effectiveness requirements specified in Government Code 4217.12. The Board's determination shall be made at a regularly scheduled public hearing of which notice is given to the public at least two weeks in advance and shall be based on a cost and ~~savings~~saving comparison ~~findings~~finding specified in Government Code 4217.12. (Government Code 4217.12)

Supplementary textbooks, library books, educational films, audiovisual materials, test materials, workbooks, instructional computer software packages, or periodicals may be purchased in any amount without taking estimates or advertising for bids. (Public Contract Code 20118.3)

Perishable foodstuffs and seasonal commodities needed in the operations of cafeterias may be purchased through bid or on the open market. (Education Code 38083)

Bids shall not be required for day labor under circumstances specified in Public Contract Code 20114. Day labor shall include the use of maintenance personnel employed on a permanent or temporary basis. (Public Contract Code 20114)

CSBA NOTE: Pursuant to Public Contract Code 20113, a district may award contracts without competitive bidding in emergency situations, as specified below. In *Marshall v. Pasadena Unified School District*, a court held that the definition of "emergency" in Public Contract Code 1102 is applicable. Public Contract Code 1102 defines "emergency" as a "sudden, unexpected occurrence that poses a clear and imminent danger, requiring immediate action to prevent or mitigate the loss or impairment of life, health, property, or essential public services."

In an emergency when any repairs, alterations, work, or improvement to any school facility is necessary to permit the continuance of existing school classes or to avoid danger to life or property, the Board may, by unanimous vote and with the approval of the County Superintendent of Schools, contract for labor and materials or supplies without advertising for or inviting bids or may authorize the use of day labor or force account for the emergency purpose. (Public Contract Code 1102, 20113)

The district may purchase any surplus property from the federal government or any of its agencies in any quantity needed for the operation of its schools without taking estimates or advertising for bids. (Education Code 17602)

Policy Reference UPDATE Service

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Policy Reference Disclaimer:

These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State	Description
Bus. Code 7056	General engineering contractor
Bus. Code 7057	General building contractor
Code of Civil Procedure 446	Verification of pleadings

Ed. Code 17070.10-17079.30	Leroy F. Greene School Facilities Act
Ed. Code 17250.10-17250.55	Design-build contracts
<u>Ed. Code 17250.60-17250.69</u>	<u>Alternative design-build contracts</u>
Ed. Code 17406	Lease-leaseback contract
Ed. Code 17595	Purchase of supplies through Department of General Services
Ed. Code 17602	Purchase of surplus property from federal agencies
Ed. Code 38083	Purchase of perishable foodstuffs and seasonal commodities
Ed. Code 38110-38120	Apparatus and supplies
Ed. Code 39802	Transportation services
Gov. Code 4217.10-4217.18	Energy conservation contracts
Gov. Code 4330-4334	California made materials
Gov. Code 53060	Special services and advice
Gov. Code 54201-54205	Purchase of supplies and equipment by local agencies
Gov. Code 7920.530	Definition of public record
Pub. Cont. Code 1102	Definition of emergency
Pub. Cont. Code 1103	Definition; responsible bidder
Pub. Cont. Code 12200	Definitions; recycled goods, materials, and supplies
Pub. Cont. Code 2000-2002	Responsive bidders
Pub. Cont. Code 20101-20103.7	Public construction projects; requirements for bidding
Pub. Cont. Code 20103.8	Award of contracts
Pub. Cont. Code 20110-20118.4	Local Agency Public Construction Act; school districts
Pub. Cont. Code 20189	Bidder's security; earthquake relief
Pub. Cont. Code 22000-22045	<u>Alternative procedures for public projects (UPCCAA) Uniform Public Construction Cost Accounting Act</u>
Pub. Cont. Code 22152	Recycled product procurement
Pub. Cont. Code 3000-3010	Roofing projects
Pub. Cont. Code 3400	Bid specifications; preference for materials
Pub. Cont. Code 3410	U.S. produce and processed foods
Pub. Cont. Code 4113	Prime contractor; subcontractor

[Pub. Cont. Code 6102](#)

Pub. Cont. Code 6610

Management Resources

Attorney General Opinion

Court Decision

Court Decision

Court Decision

Court Decision

Court Decision

[California Department of General Services Publication](#)

[California Department of Industrial Relations Publication](#)

Website

Website

[Website](#)

Website

Website

Website

Cross References

[Bribery of public official; voidable contract](#)

Bid visits

Description

89 Ops.Cal.Atty.Gen. 1 (2006)

City of Inglewood-Los Angeles County Civic Center Authority v. Superior Court, (1972) 7 Cal.3d 861

Great West Contractors Inc. v. Irvine Unified School District, (2010) 187 Cal.App.4th 1425

Konica Business Machines v. Regents of the University of California, (1988) 206 Cal.App.3d 449

Los Angeles Unified School District v. Great American Insurance Co., (2010) 49 Cal.4th 739

Marshall v. Pasadena Unified School District, (2004) 119 Cal.App.4th 1241

[Office of Public School Construction Notification to School Districts Regarding Use of Piggyback Contracts for SAB-Administered Programs, July 2022](#)
(<https://www.dgs.ca.gov/-/media/Divisions/OPSC/Resources/Piggyback-Contracts/Piggyback-Contract-Email-Blast-July-5-2022FINAL-ADA.pdf?la=en&hash=9594C7B8BD4C9796DDB57D68775331EEA8CE658A>)

[Model Prequalification Questionnaire](#)
(<https://www.dir.ca.gov/Public-Works/Public-Works-Pre%E2%80%90Qualification-of-Contractors.html>)

CSBA District and County Office of Education Legal Services

California Department of General Services

[Office of Public School Construction, Piggyback Contracts](#)
(<https://www.dgs.ca.gov/OPSC/Resources/Page-Content/Office-of-Public-School-Construction-Resources-List-Folder/Piggyback-Contracts-for-SAB-Administered-Programs>)

CSBA

California Department of Education

California Association of School Business Officials

Code	Description
0410	Nondiscrimination In District Programs And Activities
1113	District And School Websites
1113	District And School Websites
1113-E(1)	District And School Websites
1340	Access To District Records
1340	Access To District Records
3000	Concepts And Roles
3230	Federal Grant Funds
3230	Federal Grant Funds
3270	Sale And Disposal Of Books, Equipment And Supplies
3270	Sale And Disposal Of Books, Equipment And Supplies
3300	Expenditures And Purchases
3311.1	Uniform Public Construction Cost Accounting Procedures
3311.1	Uniform Public Construction Cost Accounting Procedures
3311.2	Lease-Leaseback Contracts
3311.3	Design-Build Contracts
3311.4	Procurement Of Technological Equipment
3312	Contracts
3314	Payment For Goods And Services
3314	Payment For Goods And Services
3510	Green School Operations
3511	Energy And Water Management
3511	Energy And Water Management
3511.1	Integrated Waste Management
3511.1	Integrated Waste Management
3512	Equipment
3512-E(1)	Equipment
3517	Facilities Inspection
3517-E(1)	Facilities Inspection
3540	Transportation

3551	Food Service Operations/Cafeteria Fund
3551	Food Service Operations/Cafeteria Fund
3580	District Records
3580	District Records
3600	Consultants
6161.1	Selection And Evaluation Of Instructional Materials
6161.1	Selection And Evaluation Of Instructional Materials
6161.1-E(1)	Selection And Evaluation Of Instructional Materials
6161.11	Supplementary Instructional Materials
6163.1	Library Media Centers
7000	Concepts And Roles
7140	Architectural And Engineering Services
7140	Architectural And Engineering Services
9270	Conflict Of Interest
9270-E(1)	Conflict Of Interest
9320	Meetings And Notices
9323.2	Actions By The Board
9323.2-E(1)	Actions By The Board
9323.2-E(2)	Actions By The Board

Regulation 3311.3: Design-Build Contracts

Status: ADOPTED

Original Adopted Date: 12/01/2016 | Last Revised Date: 03/09/01/2024~~2023~~ | Last Reviewed Date: 03/09/01/2024~~2023~~

CSBA NOTE: As an alternative to the more traditional design-bid-build process (see BP/AR 3311 - Bids) or a lease-leaseback process (see AR 3311.2 - Lease-Leaseback Contracts), the district may, until January 1, 2025, enter into a design-build contract for a public works project in excess of \$1 million, 000,000 pursuant to Education Code 17250.10-17250.55. As defined by Education Code 17250.15, "design-build" means a project delivery process in which both the design and construction of a project are procured from a single entity. Additionally, pursuant to Education Code 17250.61, as added by AB 185 (Ch. 571, Statutes of 2022), the district may, until January 1, 2029, enter into an alternative design-build contract for a public works project in excess of \$5,000,000. As defined by Education Code 17250.60, "alternative design-build" means a project delivery process in which both the design and construction of a project are procured from a single design-build entity based on its proposed design cost, general conditions, overhead, and profit as a component of the project price. Education Code 17250.15 and, 17250.25, 17250.60, and 17250.61 provide that such contracts may be awarded to either the low bid or best value, as defined.

~~The~~Until January 1, 2025, the Governing Board may approve a design-build contract with a single entity for both design and construction of any school facility in excess of \$1,000,000, awarding the contract to either the low bid or the best value as determined by evaluation of objective criteria. (Education Code 17250.20)

Additionally, until January 1, 2029, the Board may approve an alternative design-build contract with a single entity for both design and construction of any school facility in excess of \$5,000,000. Such contracts may be awarded to the low bid or the best value, taking into consideration, at a minimum, design cost, general conditions, overhead, and profit as a component of the project price, technical design and construction expertise, and life-cycle costs. The district's determination of price shall be based on the open book evaluation of construction subcontracts. The contract may be subject to further negotiations or amendment and may be terminated by the district if the district and the design-build entity are unable to reach an agreement. (Education Code 17250.61, 17250.62, 17250.65)

Design-build documents shall not include provisions for long-term project operations, but may include operations during a training or transition period. (Education Code 17250.25, 17250.62)

Procedures for Awarding the Contract

The procurement process for design-build and alternative design-build projects shall be as follows: (Education Code 17250.25, 17250.35, 17250.62, 17250.65; Public Contract Code 2600)

1. Performance Specifications: The district shall prepare a set of documents setting forth the scope and estimated price of the project. The documents may include, but are not limited to:

- a. The size, type, and desired design character of the project
- b. Performance specifications that cover the quality of materials, equipment, and workmanship
- c. Preliminary plans or building layouts
- d. Any other information deemed necessary to describe adequately the district's needs

The performance specifications and any plans shall be prepared by a design professional who is duly licensed and registered in California.

2. Prequalification: The district shall prepare and issue a request for qualifications in order to prequalify, or develop a short list of, the design-build entities whose proposals shall be evaluated for final selection. The request for qualifications shall include, but is not limited to, all of the following elements:

- a. Identification of the basic scope and needs of the project or contract, the expected cost range, the methodology that will be used by the district to evaluate proposals, the procedure for final selection of the design-build entity, and any other information deemed necessary by the district to inform interested parties of the contracting opportunity
- b. Significant factors that the district reasonably expects to consider in evaluating qualifications, including technical design and construction expertise, acceptable safety record, and all other non-price-related factors
- c. A standard template request for statements of qualifications prepared by the district, which shall contain all of the information required pursuant to Education Code 17250.25 or 17250.62

CSBA NOTE: Public Contract Code 2600; as amended by ~~AB 2311~~ (Ch. 347, Statutes of 2020); adds a requirement to include in all bid documents and construction contracts, when applicable, a notice that the project is subject to the skilled and trained workforce requirements specified in Public Contract Code 2600-2603. Pursuant to Education Code 17250.25 and 17250.62, design-build contracts are subject to such requirements.

- d. A notice that the project is subject to the skilled and trained workforce requirements specified in Public Contract Code 2600-2603

The district also may identify specific types of subcontractors that must be included in the statement of qualifications and proposal.

3. Request for Proposals: The district shall prepare a request for proposals (RFP) that invites prequalified or short-listed entities to submit competitive sealed proposals in a manner prescribed by the district. The RFP shall include the information identified in ~~items~~Items #2a, 2b, and 2d above and the relative importance or weight assigned to each of the factors. If the district uses a best value selection method for a project, the district may reserve the right to request proposal revisions and hold discussions and negotiations with responsive proposers, in which case the district shall so specify in the request for proposals and shall publish separately or incorporate into the request for proposals applicable procedures to be

observed by the district to ensure that any discussions or negotiations are conducted in good faith.

4. Selection Based on Low Bid: For those projects utilizing low bid as the final selection method, the bidding process shall result in lump-sum bids by the prequalified or short-listed design-build entities, and the contract shall be awarded to the lowest responsible bidder.
5. Selection Based on Best Value: For those projects utilizing best value as a selection method, the following procedures shall be used:
 - a. Competitive proposals shall be evaluated using only the criteria and selection procedures specifically identified in the request for proposals. Criteria shall be weighted as deemed appropriate by the district and The proposal for a design-build project, as specified in 17250.25, shall, at a minimum, include price, unless a stipulated sum is specified; technical design and construction experience; and life-cycle costs over 15 or more years. The proposal for an alternative design-build project, as specified in 17250.62, shall, at a minimum, include design cost, general conditions, overhead, and profit as a component of the project price, unless a stipulated sum for the project is specified; technical design and construction expertise; and life-cycle costs over 15 or more years.
 - b. Following any discussions or negotiations with responsive proposers and completion of the evaluation process, the responsive proposers shall be ranked on a determination of value provided, provided that no more than three proposers are required to be ranked.
 - c. The contract shall be awarded to the responsible entity whose proposal is determined by the district to have offered the best value to the public.
 - d. The district shall publicly announce the contract award, identifying the entity to which the award is made and the basis of the award. This statement and the contract file shall provide sufficient information to satisfy an external audit.

Skilled and Trained Workforce

CSBA NOTE: Education Code 17250.25 requires the district to obtain an enforceable commitment that the contractor will comply with the requirements to use a skilled and trained workforce, as defined, in accordance with Public Contract Code 2600-2603. Pursuant to Public Contract Code 2600.5; as added by AB 2311, failure to provide the notice described in ~~items~~ Items #2d and 3 above does not excuse the district from the requirement to obtain an enforceable commitment that a contractor or other entity will use a skilled and trained workforce to complete a contract or project.

A design-build entity shall not be prequalified or short-listed unless the entity provides an enforceable commitment to the district that the entity and its subcontractors at every tier will use a skilled and trained workforce to perform all work on the project or contract that falls within an apprenticeable occupation in the building and construction trades. The entity may demonstrate such commitment through a project labor agreement, by becoming a party to the district's project labor agreement, or through an agreement with the district to provide evidence of compliance on a monthly basis during the performance of the project or contract. (Education Code 17250.25, 17250.62; Public Contract Code 2602)

Skilled and trained workforce means that all the workers performing the work are either skilled journeypersons or apprentices registered in a state-approved apprenticeship program. At least 60 percent of the skilled journeypersons employed to perform the work shall be graduates of an apprenticeship program for the applicable occupation or at least 60 percent of the hours worked by skilled journeypersons shall be performed by graduates of an apprenticeship program, with the exception of certain occupations specified in Public Contract Code 2601 which are subject to a 30 percent threshold. (Public Contract Code 2601)

If the contractor fails to provide the monthly report demonstrating compliance with the skilled and trained workforce requirements or provides an incomplete report, the district shall withhold further payments until a complete report is provided. If a report does not demonstrate compliance with the skilled and trained workforce requirements, the district shall withhold further payments until the contractor provides a sufficient plan to achieve substantial compliance with respect to the relevant apprenticeable occupation, prior to completion of the contract or project. In addition, the district shall forward to the Labor Commissioner a copy of the monthly report, any plan to achieve compliance, and the district's response to that plan. (Public Contract Code 2602)

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Policy Reference Disclaimer:

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State

Ed. Code 17250.10-17250.55

[Ed Code 17250.60-17250.69](#)

Pub. Cont. Code 2600-2603

Description

Design-build contracts

[Alternative design-build contracts](#)

Skilled and trained workforce requirements

Management Resources

Website

Website

Website

Website

Description

CSBA District and County Office of Education Legal Services

California Association of School Business Officials

California Department of Education, School Facilities

CSBA

Cross References

Code

3311

3311

3312

7000

Description

Bids

Bids

Contracts

Concepts And Roles

7110	Facilities Master Plan
7140	Architectural And Engineering Services
7140	Architectural And Engineering Services

Policy 3312: Contracts

Status: ADOPTED

Original Adopted Date: 11/01/2003 | **Last Revised Date:** 04/09/01/2015 ~~2023~~ | **Last Reviewed Date:** 04/09/01/2015 ~~2023~~

CSBA NOTE: Several statutes authorize the Governing Board to contract for services, equipment, materials, and supplies on behalf of the district. Such statutes include, but are not limited to, Education Code 17596 which allows a broad range of services to be performed under a "continuing contract" and Education Code 45103.5 which authorizes a contract for management consulting services relating to food service.

Some contracts are subject to certain specific legal requirements which, if not complied with, may render the contract void or unenforceable. For instance, when contracting for the purchase of equipment, materials, or supplies in excess of the current bid limit (~~\$92,600~~ 109,300 for ~~2019~~ 2023), the district must seek competitive bids, pursuant to Public Contract Code 20111. See sections below titled "Contracts for Non-nutritious Foods or Beverages," "Contracts for Electronic Products and Services," "Contracts for Digital Storage and Maintenance of Student Records," and "Contracts for Personal Services" for specific requirements and/or restrictions related to those contracts. See AR 3311.3 - Design-Build Contracts for information about design-build contracts for public works projects in excess of \$1 million, 000,000 and for alternative design-build projects in excess of \$5,000,000. The district should consult its CSBA's District and County Office of Education Legal Services or district legal counsel when questions arise about legal requirements for specific kinds of contract.

The Governing Board recognizes its responsibility to enter into contracts on behalf of the district for the acquisition of equipment, supplies, services, and other resources necessary for the achievement of district goals. In exercising this authority to enter into a contract, the Board shall ensure that the district's interest is protected and that the terms of the contract conform to applicable legal standards, including the bidding requirements in Public Contract Code 20111.

CSBA NOTE: When entering into a contract, a school district is required to comply with California's conflict of interest laws, including, but not limited to, Government Code 1090 (financial interest in a contract), Government Code 87100-87500 (Political Reform Act), and Government Code 84308, as amended by SB 1439 (Ch. 848, Statutes of 2022), related to conflict of interest from campaign contributions. The violation of any of these laws could result in cancellation of the contract and, in certain cases, the Board members and/or district officials implicated could be subject to civil and criminal penalties. For example, pursuant to Government Code 84308, as amended, Board members are prohibited from participating in decisions involving parties who have provided campaign contributions of more than \$250 in the prior 12 months. Additionally, pursuant to Public Contract Code 6102, as added by SB 34 (Ch. 297, Statutes of 2022), a contract executed on or after January 1, 2023, including a contract negotiated prior to January 1, 2023, is voidable if entered into in violation of a state or federal crime relating to bribery of a public official, including, but not limited to, a violation of Penal Code 68 or 86. For more information related to the policy on conflict of interest, see BB 9270 – Conflict of Interest.

In addition, Board members and district employees involved in the making of contracts on behalf of the district shall comply with the district's conflict of interest policy as specified in Board Bylaw

9270 – Conflict of Interest.

CSBA NOTE: The following optional paragraph may be revised to specify any desired limits to this delegation of authority.

The Board may, by a majority vote, delegate to the Superintendent or designee the authority to enter into contracts on behalf of the district. To be valid or to constitute an enforceable obligation against the district, all such contracts must be approved and/or ratified by the Board.

CSBA NOTE: The following optional paragraph reflects the requirements of Education Code 35182.5 which are applicable to contracts for exclusive or nonexclusive advertising and sale of carbonated beverages or non-nutritious foods or beverages. Though not required for all contracts, such requirements help to minimize public waste and ensure transparency in public contracting and should be adopted by the Board for other contracts. See "Contracts for Non-nutritious Foods or Beverages" below.

Every contract entered into on behalf of the district shall be made available for public inspection, except when the law prohibits disclosure. No contract shall prohibit a district employee from disparaging the goods or services of any contracting party.

Contracts for Non-nutritious Foods or Beverages

CSBA NOTE: Foods and beverages that do not meet nutritional standards specified in law may not be sold in schools except under limited circumstances; see BP/AR 3554 - Other Food Sales. Schools that do not participate in the National School Lunch or Breakfast program are required to comply with the nutritional standards in Education Code 49431-49431.7 and 5 CCR 15500-15501 and 15575-15578 from one-half hour before the school day to one-half hour after it. Schools that participate in the National School Lunch or Breakfast program must comply with the stricter of the nutritional standards in 7 CFR 210.11 and 220.12 and Education Code 49431-49431.7 between midnight before and one-half hour after the end of the school day.

The district shall not enter into or renew a contract for the sale of foods or beverages that do not meet applicable nutritional standards specified in Education Code 49431-49431.7, 5 CCR 15500-15501 or 15575-15578, or 7 CFR 210.11 or 220.12, unless the contract specifies that such sale will occur off campus or outside the time restriction specified in the applicable law.

CSBA NOTE: Pursuant to Education Code 35182.5, the district may not enter into a contract that grants exclusive or nonexclusive sales or advertising for carbonated beverages, non-nutritious beverages, or non-nutritious foods unless the Board holds a public hearing and, as **mandated**, adopts a policy that ensures that internal controls are in place to protect the integrity of public funds, that the funds raised will benefit public education, and that the contracts are entered into on a competitive basis.

Before the district enters into or renews a contract that grants exclusive or nonexclusive advertising or sale of carbonated beverages, non-nutritious beverages, or non-nutritious foods as defined in law, the Board shall ensure that the district has sufficient internal controls in place to protect the integrity of public funds and to ensure that funds raised as a result of the contract benefit public education. (Education Code 35182.5)

CSBA NOTE: Education Code 35182.5 does not define the term "internal controls." Items #1-2 below are based on suggested "internal controls" as recommended by the California Association of

School Business Officials (CASBO), and should be modified to reflect the specific internal controls developed by the district.

The Superintendent or designee shall develop the district's internal control procedures to protect the integrity of public funds. Such internal controls may include, but not be limited to, the following:

1. Procedures that produce accurate and reliable financial statements and, at the same time, safeguard the assets, financial resources, and integrity of every employee responsible for handling money or property. Control systems shall be systematically evaluated and revised to keep pace with the changing responsibilities of management.
2. Procedures to ensure that district personnel do not handle cash or product at the school site. The contract shall specify that the vendor stock the machines and shall provide cash accounting, along with a check, for district proceeds directly to the control office.

CSBA NOTE: Optional ~~items~~ Items #1-4 below are not required by law, but present additional factors for the Board to consider to help ensure that the funds raised benefit public education in accordance with Education Code 35182.5. The following list should be modified to reflect district practice.

To ensure that funds raised by the contract benefit district schools and students:

1. The Superintendent or designee may invite parents/guardians, students, staff, and interested community members to make recommendations regarding the contract, including recommendations as to how the funds will be spent in a manner that benefits public education.
2. Prior to ratifying the contract, the Board shall designate the specific programs and activities that will be funded by the proceeds of the contract and consider how the contract reflects the district's vision and goals.
3. The contract shall specify that the contractor report, on a quarterly basis, to the Superintendent or designee the number of food items or beverages sold within the district and the amount of money raised by the sales. The Superintendent or designee shall report these amounts to the Board on a regular basis.
4. The Superintendent or designee shall ensure that the contract does not limit the ability of student and parent organizations to plan and operate fundraising activities.

CSBA NOTE: Education Code 35182.5 **mandates** ~~that~~ Board policy to ensure that the contract is entered into on a competitive basis pursuant to Public Contract Code 20111 or through the issuance of a Request for Proposal. Public Contract Code 20111 requires districts to seek competitive bids through advertisements for contracts ~~for~~ or services exceeding an amount specified in law. For a detailed procedure for the bidding of contracts, see AR 3311 - Bids.

Any contract for the sale or advertisement of non-nutritious foods or carbonated or non-nutritious beverages shall be entered into on a competitive bid basis pursuant to Public Contract Code 20111 or through the issuance of a Request for Proposal. (Education Code 35182.5)

CSBA NOTE: Pursuant to Education Code 35182.5, the public hearing required before the district may enter into or renew a contract for non-nutritious foods or carbonated or non-nutritious

beverages may be met through an annual public hearing to review and discuss existing and potential contracts for the sale of foods and beverages on campuses, as provided in Option 1 below. Option 2 is available for districts that prefer to hold a public hearing for the making or renewal of each contract involving non-nutritious foods or beverages.

The Board shall hold an annual public hearing to review and discuss all existing and potential contracts for the sale of foods and beverages on campus, including those sold as full meals or through competitive sales, fundraisers, or vending machines. The Board shall hold a public hearing~~meeting~~ for any contract not discussed at the annual public hearing. (Education Code 35182.5)

The Board shall not enter into or renew any contract that grants exclusive or nonexclusive advertising or sale of carbonated beverages, non-nutritious beverages, ~~or~~ on non-nutritious foods until parents/guardians, students, and members of the public have had an opportunity to comment on the contract at a public hearing held during a regularly scheduled Board meeting. The Board shall clearly, and in a manner recognizable to the general public, identify in the agenda the contract to be discussed at the meeting. (Education Code 35182.5~~.)~~)

The public hearing shall include, but not be limited to, a discussion of the nutritional value of foods and beverages sold within the district; the availability of fresh fruit, vegetables, and grains in school meals and snacks, including locally grown and organic produce; the amount of fat, sugar, and additives in the foods and beverages discussed; and barriers to student participation in school breakfast and lunch programs. (Education Code 35182.5)

The contract shall be accessible to the public and may not include a confidentiality clause that would prevent the district or a district school from making any part of the contract public. (Education Code 35182.5)

Contracts for Electronic Products or Services

CSBA NOTE: Education Code 35182.5 prohibits districts or schools from entering into contracts for electronic products or services that require dissemination of advertising to students, unless the following conditions are satisfied. This section should be modified to reflect any additional requirements included by the district.

The Board shall not enter into a contract for electronic products or services that requires the dissemination of advertising to students, unless the Board: (Education Code 35182.5)

1. Enters into the contract at a noticed, public hearing of the Board.

2. Makes a finding that the electronic product or service is or would be an integral component of the education of students.
3. Makes a finding that the district cannot afford to provide the electronic product or service unless it contracts to permit dissemination of advertising to students.
4. As part of the district's normal, ongoing communication to parents/guardians, provides written notice that the advertising will be used in the classroom or other learning center.
5. Offers parents/guardians the opportunity to request in writing that their child not be exposed to the program that contains the advertising. A request shall be honored for the school year in which it is submitted, or longer if specified, but may be withdrawn by the parents/guardians at any time.

Contracts for Digital Storage and Maintenance of Student Records

CSBA NOTE: Pursuant to Education Code 49073.1, as added by AB 1584 (Ch. 800, Statutes of 2014), the Board is **mandated** to adopt a policy when the district chooses to enter into a contract with a third party to provide services specified in the following section.

If the district has a contract in effect prior to January 1, 2015, the requirements of Education Code 49073.1 will not become effective until the expiration, amendment, or renewal of the existing contract.

The district may enter into or renew a contract with a third party for the purpose of providing services, including cloud-based services, for the digital storage, management, and retrieval of student records and/or to provide digital educational software that authorizes a third-party provider of digital educational software to access, store, and use student records. For these purposes, student records include any information maintained by the district that is directly related to a student and any information acquired directly from the student through the use of instructional software or applications assigned to the student by a teacher or other district employee, and do not include de-identified information. (Education Code 49073.1)

Any such contract shall contain all of the following: (Education Code 49073.1)

1. A statement that student records continue to be the property of and under the control of the district
2. If applicable, a description of the means by which students may retain possession and control of their own student-generated content, as defined in Education Code 49073.1, including options by which a student may transfer student-generated content to a personal account
3. A prohibition against the third party using any information in the student record for any purpose other than those required or specifically permitted by the contract
4. A description of the procedures by which a parent/guardian or a student age 18 years or older may review personally identifiable information in the student's records and correct erroneous information

5. A description of the actions the third party will take, including the designation and training of responsible individuals, to ensure the security and confidentiality of student records
6. A description of the procedures for notifying the affected parent/guardian, or the affected student if age 18 years or older, in the event of an unauthorized disclosure of the student's records
7. A certification that a student's records shall not be retained or available to the third party upon completion of the terms of the contract and a description of how that certification will be enforced, except that these requirements shall not apply to student-generated content if the student chooses to establish or maintain an account with the third party for the purpose of storing that content
8. A description of how the district and the third party will jointly ensure compliance with the federal Family Educational Rights and Privacy Act, 20 USC 1232g
9. A prohibition against the third party using personally identifiable information in student records to engage in targeted advertising

Contracts for Personal Services

CSBA NOTE: The following optional paragraph is applicable when the district chooses to contract for personal services that are currently or customarily performed by its classified employees. Pursuant to Education Code 45103.1, such a contract may be entered into or renewed by the district in order to achieve cost savings, but only if the contract (1) is awarded through a publicized, competitive bidding process; (2) does not result in displacement of district employees (layoff, demotion, involuntary transfer to a new classification, etc.); and (3) meets other specified conditions.

In order to achieve cost savings, the district may enter into or renew a contract for any personal service that is currently or customarily performed by classified employees, if the contract does not displace school district employees and meets other conditions specified in Education Code 45103.1. To enter into or renew such a contract, the Board shall ensure that the district meets the numerous conditions specified in Education Code 45103.1.

CSBA NOTE: Education Code 45103.1 also permits personal service contracts that do not meet the conditions specified in the paragraph above in the circumstances as listed below.

In addition, the district may enter into or renew any contract for personal service without meeting the conditions described above, if any of the following conditions exists: (Education Code 45103.1)

1. The contract is for new district functions and the Legislature has specifically mandated or authorized the performance of the work by independent contractors.
2. The services contracted are not available within the district, cannot be performed satisfactorily by district employees, or are of such a highly specialized or technical nature that the necessary expert knowledge, experience, and ability are not available through the district.
3. The services are incidental to a contract for the purchase or lease of real or personal property, including, but not be limited to, agreements to service or maintain office

equipment or computers that are leased or rented:

4. The district's policy, administrative, or legal goals and purposes cannot be accomplished through the utilization of persons selected pursuant to the regular or ordinary district hiring process:
5. The nature of the work is such that the criteria for emergency appointments, as defined in Education Code 45103.1, apply:
6. The contractor will provide equipment, materials, facilities, or support services that could not feasibly be provided by the district in the location where the services are to be performed:
7. The services are of such an urgent, temporary, or occasional nature that the delay that would result from using the district's regular or ordinary hiring process would frustrate their very purpose:

Policy Reference UPDATE Service

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Policy Reference Disclaimer:

These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State	Description
5 CCR 15500	Food sales in elementary schools
5 CCR 15501	Food sales in high schools and junior high schools
5 CCR 15575-15578	Requirements for foods and beverages outside the federal meals program
Ed. Code 14505	Provisions required in contracts for audits
Ed. Code 17250.10-17250.55	Design-build contracts
Ed. Code 17595-17606	Contracts
Ed. Code 200-262.4	Prohibition of discrimination
Ed. Code 35182.5	Contracts for advertising
Ed. Code 45103.1	Personal services contracts
Ed. Code 45103.5	Contracts for management consulting services; restrictions
Ed. Code 49073.1	Contract requirements for digital storage, maintenance, and retrieval of student records
Ed. Code 49431-49431.7	Nutritional standards
Gov. Code 12990	Nondiscrimination and compliance employment programs

Gov. Code 53260	Contract provision re maximum cash settlement
Gov. Code 53262	Employment contracts
Gov. Code 84308	Campaign disclosure
Lab. Code 1775	Penalties for violations
Lab. Code 1810-1813	Working hours
Pub. Cont. Code 20104.50	Timely progress payments
Pub. Cont. Code 20111	Contracts over \$50,000; contracts for construction; award to lowest responsible bidder
Pub. Cont. Code 22300	Performance retentions
Pub. Cont. Code 4100-4114	Subletting and subcontracting fair practices
Pub. Cont. Code 6102	Awarding of contracts
Pub. Cont. Code 7104	Contracts for excavations; discovery of hazardous waste
Pub. Cont. Code 7106	Noncollusion affidavit

Federal

20 USC 1232g	Description Family Educational Rights and Privacy Act (FERPA) of 1974
20 USC 1681-1688	Title IX of the Education Amendments of 1972; discrimination based on sex
7 CFR 210.1-210.31	National School Lunch Program
7 CFR 220.1-220.21	National School Breakfast Program

Management Resources

CSBA Publication	Description Student Wellness: A Healthy Food and Physical Activity Policy Resource Guide, rev. 2005
CSBA Publication	Student Wellness: A Healthy Food and Physical Activity Policy Resource Guide, rev. April 2006
Website	CSBA District and County Office of Education Legal Services
Website	CSBA
Website	California Association of School Business Officials

Cross References

Code	Description
0100	Philosophy
0200	Goals For The School District
0440	District Technology Plan

0440	District Technology Plan
1220	Citizen Advisory Committees
1220	Citizen Advisory Committees
1230	School-Connected Organizations
1230	School-Connected Organizations
1321	Solicitation Of Funds From And By Students
1321	Solicitation Of Funds From And By Students
1325	Advertising And Promotion
1340	Access To District Records
1340	Access To District Records
1700	Relations Between Private Industry And The Schools
2121	Superintendent's Contract
3000	Concepts And Roles
3100	Budget
3100	Budget
3230	Federal Grant Funds
3230	Federal Grant Funds
3290	Gifts, Grants And Bequests
3300	Expenditures And Purchases
3311	Bids
3311	Bids
3311.1	Uniform Public Construction Cost Accounting Procedures
3311.1	Uniform Public Construction Cost Accounting Procedures
3311.2	Lease-Leaseback Contracts
3311.3	Design-Build Contracts
3311.4	Procurement Of Technological Equipment
3314	Payment For Goods And Services
3314	Payment For Goods And Services
3400	Management Of District Assets/Accounts
3400	Management Of District Assets/Accounts
3460	Financial Reports And Accountability

3460	Financial Reports And Accountability
3470	Debt Issuance And Management
3511.1	Integrated Waste Management
3511.1	Integrated Waste Management
3540	Transportation
3551	Food Service Operations/Cafeteria Fund
3551	Food Service Operations/Cafeteria Fund
3554	Other Food Sales
3554	Other Food Sales
3555	Nutrition Program Compliance
3555-E(1)	Nutrition Program Compliance
3600	Consultants
4030	Nondiscrimination In Employment
4030	Nondiscrimination In Employment
4112.23	Special Education Staff
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4132	Publication Or Creation Of Materials
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4200	Classified Personnel
4212.4	Health Examinations
4232	Publication Or Creation Of Materials
4312.1	Contracts
4312.4	Health Examinations
4332	Publication Or Creation Of Materials
5030	Student Wellness
5125	Student Records
5125	Student Records
5145.6	Parent/Guardian Notifications
5145.6-E(1)	Parent/Guardian Notifications
5148	Child Care And Development
5148	Child Care And Development

6162.6	Use Of Copyrighted Materials
6162.6	Use Of Copyrighted Materials
7140	Architectural And Engineering Services
7140	Architectural And Engineering Services
9000	Role Of The Board
9124	Attorney
9320	Meetings And Notices
9322	Agenda/Meeting Materials
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Policy 3460: Financial Reports And Accountability

Status: ADOPTED

Original Adopted Date: 11/01/2004 | **Last Revised Date:** ~~12~~09/01/2022~~2023~~ | **Last Reviewed Date:** ~~12~~09/01/2022~~2023~~

CSBA NOTE: The following policy is optional and should be revised to reflect district practice.

The Governing Board is committed to ensuring public accountability and the fiscal health of the district. The Board shall adopt sound fiscal management policies and practices, oversee the district's financial condition, and continually evaluate whether the district's budget and financial operations support the district's goals for student achievement.

CSBA NOTE: The following optional paragraph sets the Governing Board's expectation that the district's financial reports will adhere to generally accepted financial and accounting standards. The Governmental Accounting Standards Board (GASB) is a nonprofit agency that establishes financial and accounting standards for state and local government agencies, including school districts. By using the California Department of Education's (CDE) standardized account code structure (SACS) software to develop financial reports, the district will be assured of complying with generally accepted accounting principles prescribed by GASB and meeting other state and federal reporting guidelines.

The Superintendent or designee shall ensure that district financial reports are prepared in accordance with law and in conformity with generally accepted accounting principles and financial reporting standards stipulated by the Governmental Accounting Standards Board and the California Department of Education (CDE). The Superintendent or designee shall establish a system of ongoing internal controls to ensure the reliability of financial reporting.

When required by law or as directed by the Board, the Superintendent or designee shall submit to the Board reports of the district's financial status, including, but not limited to, any report specified in this Board policy or accompanying administrative regulation. When submission of any such report to a local, state, and/or federal agency requires prior Board approval, the Superintendent or designee shall provide the report to the Board in sufficient time to enable the Board to carefully review the report without breaking any applicable submission deadline.

CSBA NOTE: The Fiscal Crisis and Management Assistance Team (FCMAT) is an independent entity ~~created~~ whose primary mission is to help districts identify, prevent, and resolve financial, operational, and data management challenges, including assisting districts to avert fiscal insolvency ~~and to provide,~~ providing districts with fiscal management assistance. ~~In August 2019, FCMAT revised the 15 identified predictors of fiscal distress common in districts needing state intervention,~~ and creating efficient organizational operations. According to FCMAT's, "Indicators of Risk or Potential Insolvency for K-12 Local Education Agencies," the indicators of risk or potential insolvency include, ~~but are not limited to,~~ conditions related to unreliable budget development, insufficient budget monitoring or updates, inadequate cash management, mismanaged collective bargaining agreements, increasing and/or unplanned contributions and transfers, continuing deficit spending, mismanaged employee benefits, ~~and~~ inattention to enrollment and attendance reporting, decreasing fund balance and reserve for economic uncertainty, ineffective internal controls and fraud prevention, breakdown in leadership and

communication, lack of multiyear planning, inattention to non-voter-approved debt and risk management, lack of position control, and other issues of concern.

In reviewing the district's budget (see AR 3100 - Budget), the County Superintendent of Schools is required by Education Code 42127 and 42127.6 to consider any studies, reports, evaluations, or audits of the district that contain evidence of fiscal distress based on the standards and criteria specified in Education Code 33127 or a finding that the district is in moderate or high risk of intervention based on the most common FCMAT indicators of a district needing intervention; see BP/AR 3100 - Budget. In the event of any such evidence or finding, or if the district is showing fiscal distress under state criteria and standards for budgets or interim reports, as specified in 5 CCR 15440-15451 and 15453-15464, the County Superintendent is required to investigate whether the district may be unable to meet the current year's or two subsequent fiscal years' financial obligations.

The Board shall regularly assess the district's financial position and communicate the results to the public, and shall use financial reports to determine the actions and budget amendments, if any, that are needed to ensure the district's financial stability. If district conditions predict fiscal distress or indicate that the district might not be able to meet its fiscal obligations, the Board and Superintendent or designee shall take action to resolve these conditions without delay. The Board shall work cooperatively with the County Superintendent of Schools to improve the district's fiscal health and may contract with an external individual or organization to provide the district with needed advice or fiscal management or training.

CSBA NOTE: When a district is fiscally insolvent and is considering applying to the state for an emergency apportionment that exceeds 200 percent of the recommended reserve for that district, Education Code 41326 requires the Board to first discuss the need for that apportionment at a regular or special meeting. At that meeting, the Board must is required to receive testimony from parents/guardians, exclusive representatives of employees of the district, and other community members. Any district that receives such an apportionment is subject to the conditions set forth in Education Code 41326, including assumption of all the Board's legal rights, duties, and powers by a state-appointed administrator. the County Superintendent, who is required to appoint, with concurrence from the Superintendent of Public Instruction (SPI) and President of the State Board of Education (SBE), or the President's designee, an administrator to exercise the authority.

If the district is facing fiscal insolvency, the Board may consider applying to the state for an emergency apportionment that exceeds 200 percent of the district's recommended reserve. Before applying for such emergency apportionment, the Board shall discuss, at a regular or special meeting, the need for an emergency apportionment and receive testimony regarding the apportionment from parents/guardians, the exclusive representatives of employees of the district, and other members of the community. (Education Code 41326)

Unaudited Actual Receipts and Expenditures

On or before September 15, the Board shall approve and file with the County Superintendent a statement of the district's unaudited actual receipts and expenditures for the preceding fiscal year. The Superintendent or designee shall prepare this statement using the state's standardized account code structure (SACS) as prescribed by the Superintendent of Public Instruction (SPI). (Education Code 42100)

Gann Appropriations Limit Resolution

On or before September 15, the Board shall, at a regular or special meeting, adopt a resolution identifying, pursuant to Government Code 7900-7914, the district's estimated appropriations limit for the current fiscal year and the actual appropriations limit for the preceding fiscal year. Documentation used to identify these limits shall be made available to the public on the day of the Board meeting. (Education Code 42132; Government Code 7910)

Interim Reports/Certification of Ability to Meet Fiscal Obligations

CSBA NOTE: Education Code 42130 requires that the district issue two interim reports, as described below, based on the criteria and standards for fiscal stability adopted by the ~~State Board of Education~~ (SBE) pursuant to Education Code 33127. These criteria and standards are delineated in 5 CCR 15453-15464. See the accompanying administrative regulation for further information about the contents of the interim reports.

Each fiscal year, the Superintendent or designee shall submit two interim reports to the Board. The first report shall cover the district's financial and budgetary status for the period ending October 31 and the second report shall cover the period ending January 31. These reports and supporting data shall be made available by the district for public review. (Education Code 42130)

Within 45 days after the close of the period reported, the Board shall approve the interim report and, on the basis of the interim report and any additional financial information known by the Board, shall certify in writing whether the district will be able to meet its fiscal obligations for the remainder of the fiscal year and, based on current forecasts, for the two subsequent fiscal years. The certification shall be classified as one of the following: (Education Code 42130, 42131)

1. 1. "Positive certification" indicating that the district will meet its financial obligations for the current fiscal year and two subsequent fiscal years
2. 2. "Qualified certification" indicating that the district may not meet its financial obligations for the current fiscal year or two subsequent fiscal years
3. 3. "Negative certification" indicating that the district will be unable to meet its financial obligations for the remainder of the fiscal year or the subsequent fiscal year

CSBA NOTE: Education Code 42130 and 42131 require that the interim report and certification be submitted to the County Superintendent in a format or on forms prescribed by the ~~Superintendent of Public Instruction (SPI)~~ SPI. CDE requires that these be reported using the SACS software. Pursuant to Education Code 42131, upon receiving the certification, the County Superintendent is required to send any qualified or negative certification, along with the interim report, to the State Controller and the SPI.

The Superintendent or designee shall submit a copy of each interim report and certification to the County Superintendent using the state's SACS software, as prescribed by the SPI. (Education Code 42130, 42131)

CSBA NOTE: Education Code 42131 gives the County Superintendent 75 days after the close of the reporting period to downgrade the district's positive certification to qualified or negative or a

qualified certification to negative. Districts may appeal the County Superintendent's determination to the SPI, who will then determine the certification to be given to the district.

If the district's certification is subsequently changed by the County Superintendent from a positive to a qualified or negative certification, or from a qualified to a negative certification, the Board may appeal the decision to the SPI within five days of receiving the notice of change. (Education Code 42131)

CSBA NOTE: Whenever the district receives a qualified or negative certification, Education Code 42131 requires the County Superintendent, within 75 days after the close of the reporting period, to submit comments on the certification to the State Controller and the SPI and report any remedial action proposed or taken under the authority granted by Education Code 42127.6. Pursuant to Education Code 42127.6, the County Superintendent is required to take one or more of the following actions: (1) assign a fiscal expert to advise the district on the financial problems; (2) conduct a study of the district's financial and budgetary conditions including, but not limited to, a review of internal controls; (3) direct the district to submit a financial projection of all fund and cash balances as of June 30 of the current year and subsequent fiscal years; (4) require the district to encumber all contracts and other obligations, prepare appropriate cash flow analyses and monthly or quarterly budget revisions, and appropriately record all receivables and payables; (5) direct the district to submit a proposal for addressing the fiscal conditions that caused the negative or qualified certification; (6) withhold Board stipend and Superintendent compensation if requested financial information is not provided; and/or (7) assign FCMAT to review and provide recommendations to improve the district's teacher hiring process, teacher retention rate, ~~extent of teacher misassignment,~~ and percentage of provision of highly qualified teachers, and extent of teacher misassignment. Education Code 42131 also authorizes the State Controller to conduct an audit or review of the financial condition of any district having a negative or qualified certification.

Pursuant to Education Code 42652, a district that receives a qualified or negative certification also may lose the County Superintendent's or SPI's approval to draw warrants on the county treasury. Furthermore, pursuant to Education Code 42133, a district that receives a qualified or negative certification must have the County Superintendent's approval before issuing any certificates of participation, tax anticipation notes, revenue bonds, or other non-voter-approved debt (see the section "Non-Voter-Approved Debt Report" in the accompanying administrative regulation).

Whenever a district with a qualified or negative certification is negotiating a collective bargaining agreement, it must allow the County Superintendent 10 working days to review and comment on the proposed collective bargaining agreement pursuant to Government Code 3540.2; see BP 4143/4243 - Negotiations/Consultation.

Whenever the district receives a qualified or negative certification from the Board or the County Superintendent, the Superintendent or designee shall cooperate in the implementation of any remedial actions taken or prescribed by the County Superintendent. (Education Code 42131)

CSBA NOTE: Whenever the district's second interim report is accompanied by a qualified or negative certification, the district must submit another financial statement by June 1 as described below; this report is sometimes referred to as the "third interim report."

If the second interim report is accompanied by a qualified or negative certification, the Board shall, no later than June 1, provide to the County Superintendent, the State Controller, and the SPI a financial statement as of April 30 ("third interim report") that projects the district's fund and cash balances through June 30. (Education Code 42131)

CSBA NOTE: Education Code 42637 authorizes the County Superintendent, upon concluding at any time during the fiscal year, that the district's budget does not comply with criteria and standards for fiscal stability adopted by the SBE, to conduct a comprehensive review of the district's financial and budgetary conditions and, if such a review is conducted, requires the County Superintendent to report the findings to the Board at a public meeting. According to FCMAT's "Fiscal Oversight Guide," the County Superintendent must exercise this authority when the district receives a negative certification and is authorized to do so when the district receives a qualified certification. After receiving the report, the Board is required to respond to the recommendations within 15 days.

If at any time during the fiscal year, the County Superintendent concludes that the district's budget does not comply with the standards and criteria for financial stability and conducts a comprehensive review of the district's financial and budgetary conditions, the Board shall review any report of the County Superintendent's findings and recommendations at a public Board meeting. Within 15 days of receiving the report, the district shall notify the County Superintendent and the SPI of the Board's proposed actions on the recommendation. (Education Code 42637)

Audit Report

CSBA NOTE: Pursuant to Education Code 41020, the Board must, no later than May 1 of each year, arrange for an audit of all the district's funds. However, if the Board has not provided for an audit by April 1, the County Superintendent must do so at the district's cost. Thus, the paragraph below reflects the April 1 deadline.

Pursuant to Education Code 41020, any district contract for auditing services must be approved by the Board and the County Superintendent if the district has a disapproved budget, has received a negative certification on any budget or interim report during the current fiscal year or either of the two preceding fiscal years, or has otherwise been determined by the County Superintendent to have a lack of going concern.

By April 1 of each year, the Board shall provide for an annual audit of the district's books and accounts. (Education Code 41020)

CSBA NOTE: Education Code 41020 requires the Board to select an auditor from a directory of certified public accountants and public accountants deemed by the State Controller as qualified to conduct audits of local education agencies. The State Controller is required to publish this directory by December 31 of each year.

In addition, Education Code 41020.5 prohibits the Board from employing any accountant identified by the State Controller as ineligible based on failure of past audits to comply with provisions of the K-12 annual audit guide. The State Controller will annually notify districts of ineligible accountants by March 1.

To conduct the audit, the Board shall select a certified public accountant or public accountant licensed by the State Board of Accountancy from among those deemed qualified by the State Controller. (Education Code 41020, 41020.5)

CSBA NOTE: Education Code 41020 requires that districts rotate auditors as specified below. However, the district may request that the Education Audit Appeals Panel waive this requirement if no otherwise eligible auditor is available to perform the audit.

Except when, as determined by the Education Audits Appeal Panel, no otherwise eligible auditor is available, a public accounting firm whose lead or coordinating audit partner having primary responsibility for the audit or whose audit partner responsible for reviewing the audit has performed audit services for the district in each of the six previous fiscal years shall not be selected to perform a district audit. (Education Code 41020)

CSBA NOTE: Education Code 41020.3 requires the Board to review the audit report at an open meeting by January 31 of each year. However, Education Code 41020 requires that the audit report be filed with the County Superintendent, CDE, and State Controller no later than December 15. Thus, it is recommended that the Board conduct its review of the audit prior to December 15 whenever possible.

No later than December 15, the report of the audit for the preceding fiscal year shall be filed with the County Superintendent, the CDE, and the State Controller. (Education Code 41020)

Prior to December 15 whenever possible, but in no case later than January 31, the Board shall review, at an open meeting, the annual district audit for the prior year, any audit exceptions identified in that audit, the recommendations or findings of any management letter issued by the auditor, and any description of correction or plans to correct any exceptions or any issue raised in a management letter. (Education Code 41020.3)

The Board shall have an opportunity at the meeting to ask questions of the auditor and request further information about the audit findings.

Audit Committee

CSBA NOTE: The following optional section may be revised to reflect district practice. Although it is the responsibility of district staff to prepare financial statements and the responsibility of the independent auditor to assure that the information in the statements is reliable and fairly presented, establishment of an audit committee provides an additional mechanism to ensure fiscal responsibility, as well as providing an opportunity for community participation. Committees established by Board action are subject to the Brown Act; see BP/AR 1220 - Citizen Advisory Committees and BB 9130 - Board Committees.

The Board may appoint an audit committee composed of staff knowledgeable about fiscal matters, other staff, and representatives of the community.

The committee shall serve in an advisory capacity and may:

1. 1. Make recommendations regarding the selection of the external independent auditor in accordance with Education Code 41020 and 41020.5
2. 2. Review the plan for the audit process with the independent auditor to determine the adequacy of the nature, scope, and timetable of the audit
3. 3. Review the results of the audit and participate with the independent auditor and management in preparing final recommendations and responses

4. 4. Participate with the independent auditor in presenting the audit report to the Board
5. 5. Review Board policies and administrative regulations to recommend any revisions needed to ensure effective financial reporting
6. 6. Provide input on the effectiveness of the independent auditor
7. 7. Periodically report to the Board regarding the status of previous audit recommendations for improving the accounting and internal control systems

Policy Reference UPDATE Service

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Policy Reference Disclaimer:

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State	Description
2 CCR 1859.104	Leroy F. Greene School Facilities Program; reporting requirements
5 CCR 15060	Standardized account code structure
5 CCR 15070	Submission of reports using standardized account code structure
5 CCR 15440-15451	Criteria and standards for school district budgets
5 CCR 15453-15464	Criteria and standards for school district interim reports
5 CCR 19810-19816 <u>19826.1</u>	Audits
Ed. Code 1240	County superintendent of schools; duties
Ed. Code 14500-14508	Financial and compliance audits
Ed. Code 17070.10-17079.30	Leroy F. Greene School Facilities Act
Ed. Code 17150-17150.1	Public disclosure of non-voter-approved debt
Ed. Code 17170-17199. <u>56</u>	California School Finance Authority
Ed. Code 33127	Standards and criteria for local budgets and expenditures
Ed. Code 33128	Standards and criteria; inclusions
Ed. Code 33129	Standards and criteria; use by local agencies
Ed. Code 35035	Powers and duties of the superintendent; transfer authority

Ed. Code 41010-41024	Accounting system and audits
Ed. Code 41326 <u>41320-41322</u>	Emergency apportionments
<u>Ed. Code 41325-41329</u>	<u>Conditions on emergency apportionments</u>
Ed. Code 41344	Repayment of apportionment significant audit exceptions
Ed. Code 41344.1	Appeals of audit findings
Ed. Code 41455	Examination of financial problems of local districts
Ed. Code 42100-42105	Requirement to prepare and file annual statement
Ed. Code 42122-42129	Budget requirements
Ed. Code 42130-42134	Financial reports and certifications
Ed. Code 42140-42142	Public disclosure of fiscal obligations
Ed. Code 42637	County superintendent review of district's financial and budgetary conditions
Ed. Code 42652	Revocation or suspension of warrant authority
Ed. Code 48300-48316	Student attendance alternatives; school district of choice program
Ed. Code 52060-52077	Local control and accountability plan
Gov. Code 16429.1	Local agency investment fund
Gov. Code 3540.2	Meeting and negotiating in public educational employment
Gov. Code 53646	Treasurer reports and statements of investment policy
Gov. Code 7900-7914	Appropriations limit
Federal	Description
2 CFR 200.0-200.521	Federal uniform grant guidance
31 USC 7501-7507	Single audits of federal program funds
Management Resources	Description
California Department of Education Communication	New Financial Reporting Requirements for Postemployment Benefits Other than Pensions, February 26, 2007
California Department of Education Communication	Audit Resolution Process: Repayment Plans, December 8, 2000
Fiscal Crisis & Management Assistance Team Pub.	Indicators of Risk or Potential Insolvency For K-12 Local Education Agencies
Fiscal Crisis & Management Assistance Team Pub.	Fiscal Oversight Guide for AB 1200, AB 2756, AB 1840 and Related Legislation, September 2021
Governmental Accounting Standards Board Statement	Statement 87, Leases, June 2017

Governmental Accounting Standards Board Statement	Statement 54, Fund Balance Reporting and Governmental Fund Type Definitions, March February 2009
Governmental Accounting Standards Board Statement	Statement 75, Accounting and Financial Reporting by Employers for Post-employment Benefits Other Than Pensions, June 2015
Governmental Accounting Standards Board Statement	Statement 34, Basic Financial Statements and Management's Discussion and Analysis - For State and Local Governments, June 1999
Education Audit Appeals Panel Publication	Guide for Annual Audits of K-12 Local Educational Agencies and State Compliance Reporting
Office of Attorney General Publication	Guidance Regarding Laws Governing School Closures and Best Practices for Implementation in California, April 2023
State Controller Publication	Standards and Procedures for Audits of California K-12 Local Educational Agencies
U.S. Gov. Accountability Office & PCIE Publication	Financial Audit Manual, revised 2008
U.S. Gov. Accountability Office & PCIE Publication	Government Auditing Standards, 2011
Website	CSBA District and County Office of Education Legal Services
Website	Governmental Accounting Standards Board
Website	California State Controller
Website	U.S. Government Accountability Office
Website	California County Superintendents Educational Services Association
Website	California Department of Education, Finance and Grants
Website	Education Audit Appeals Panel
Website	Fiscal Crisis and Management Assistance Team
Website	CSBA
Website	California Association of School Business Officials
Website	Office of Management and Budget
Website	School Services of California, Inc.

Cross References

Code	Description
0460	Local Control And Accountability Plan
0460	Local Control And Accountability Plan

0500	Accountability
1220	Citizen Advisory Committees
1220	Citizen Advisory Committees
1340	Access To District Records
1340	Access To District Records
3000	Concepts And Roles
3100	Budget
3100	Budget
3110	Transfer Of Funds
3220.1	Lottery Funds
3230	Federal Grant Funds
3230	Federal Grant Funds
3280	Sale Or Lease Of District-Owned Real Property
3280	Sale Or Lease Of District-Owned Real Property
3290	Gifts, Grants And Bequests
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3314	Payment For Goods And Services
3314.2	Revolving Funds
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3400	Management Of District Assets/Accounts
3430	Investing
3430	Investing
3451	Petty Cash Funds
3452	Student Activity Funds
3470	Debt Issuance And Management
3510	Green School Operations
3551	Food Service Operations/Cafeteria Fund
3551	Food Service Operations/Cafeteria Fund
3580	District Records

3580	District Records
4143	Negotiations/Consultation
4143.1	Public Notice - Personnel Negotiations
4143.1	Public Notice - Personnel Negotiations
4154	Health And Welfare Benefits
4154	Health And Welfare Benefits
4243	Negotiations/Consultation
4243.1	Public Notice - Personnel Negotiations
4243.1	Public Notice - Personnel Negotiations
4254	Health And Welfare Benefits
4254	Health And Welfare Benefits
4312.1	Contracts
4331	Staff Development
4354	Health And Welfare Benefits
4354	Health And Welfare Benefits
5117	Interdistrict Attendance
5117	Interdistrict Attendance
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5126	Awards For Achievement
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Policy 3551: Food Service Operations/Cafeteria Fund

Status: ADOPTED

Original Adopted Date: 03/01/2018 | **Last Revised Date:** 06/09/01/20222023 | **Last Reviewed Date:** 06/09/01/20222023

CSBA NOTE: The following **conditionally mandated** policy may be revised to reflect district practice. Pursuant to U.S. Department of Agriculture's (USDA) Memorandum SP 46-2016, districts participating in the National School Lunch and/or Breakfast Program (42 USC 1751-1769j, 1773) are **mandated** to adopt policy addressing meal charges; see the section "Meal Sales" below and the accompanying administrative regulation. However, with the establishment of the California Universal Meal Program pursuant to Education Code 49501.5, as added by AB 130 (Ch. 44, Statutes of 2021), all public schools in California must provide free of charge, a nutritionally adequate breakfast and lunch to any student who requests a meal, regardless of the student's free or reduced-price meal eligibility status. ~~Consequently, certain program requirements may no longer be applicable.~~ Consequently, certain program requirements may no longer be applicable. For example, the California Department of Education (CDE) which, by law, provides guidance and oversight on the use of federal funding in nutrition programs, clarifies in Nutrition Services Division Management Bulletin SNP-04-2023 that districts that operate a non-pricing program such as the California Universal Meals Program, the Community Eligibility Program, or Provision 2 at all sites are not required to establish a meal charge policy because no students are charged for meals.

In view of the potential conflict between the federal requirement and CDE guidance, it is recommended that districts adopt this policy and accompanying administrative regulation which addresses meal charges, even if the district operates a non-pricing program such as the California Universal Meals Program. Districts with questions about meal charge policies should consult CSBA's District and County Offices of Education or district legal counsel.

Pursuant to 7 CFR 210.9, 210.14, and 220.7, districts participating in the National School Lunch and/or Breakfast program must maintain a nonprofit school food service program. Revenues received through the program may be used for the operation or improvement of the food service program, but not to purchase land or buildings unless otherwise approved by USDA's Food and Nutrition Services, or to construct buildings. Authorized expenditures are specified in Education Code 38101 and defined in the California Department of Education's (CDE) CDE's, "California School Accounting Manual."

The Governing Board intends that school food services shall be a self-supporting, nonprofit program. To ensure program quality and cost effectiveness, the Superintendent or designee shall centralize and direct the purchasing of foods and supplies, the planning of menus, and the auditing of all food service accounts for the district.

CSBA NOTE: The following paragraph is for use by districts that participate in the National School Lunch and/or Breakfast Program and may be adapted for use by other districts. Pursuant to 42 USC 1776 and 7 CFR 210.30, USDA has established minimum professional standards for food service directors and granted CDE the authority to adopt more flexible standards for districts with average daily attendance of less than 2,500. See CDE's Nutrition Services Division Management Bulletin SNP-13-2020 for updated information about state hiring standards.

The Superintendent or designee shall ensure that food service director(s) possess the qualifications required by 7 CFR 210.30 and California Department of Education (CDE) standards.

CSBA NOTE: The following paragraph is for use by districts participating in the National School Lunch and/or Breakfast Program. Pursuant to 42 USC 1776, such districts must ensure that food service personnel and other appropriate personnel who conduct or oversee administrative procedures receive training, at least once each year, on food service administrative practices (i.e., training in application, certification, verification, meal counting, and meal claiming procedures). In addition, all food service personnel are required to receive annual training that is designed to improve the accuracy of approvals for free and reduced-price meals and the identification of reimbursable meals at the point of service and to ensure program compliance and integrity. Food service personnel must obtain certification on an annual basis to demonstrate competence in the training. Such training is required to include modules on nutrition, health and food safety standards and methodologies, and any other appropriate topics as determined by the U.S. Secretary of Agriculture. See CDE's ~~web site~~[website](#) for online training that meets these requirements.

At least once each year, food service administrators, other appropriate personnel who conduct or oversee administrative procedures, and other food service personnel shall receive training provided by CDE. (42 USC 1776)

Meal Sales

CSBA NOTE: ~~Commencing~~[In accordance](#) with the 2022-23 school year, [Education Code 49501.5](#), each district is required; pursuant to [Education Code 49501.5](#), as added by [AB 130](#), to provide a nutritionally adequate breakfast and lunch free of charge; to any student who requests a meal, regardless of the student's eligibility for participation in the federal free or reduced-price meal program. Consequently, only nonprogram foods may be sold to students. For further information, see BP 3553 - Free and Reduced Price Meals.

[Pursuant to Education Code 49495, as added by AB 558 \(Ch. 905, Statutes of 2022\), CDE has developed guidance, "Breakfast and Snacks for Nonschoolaged Children," available on its website, which provides information on the allowability and options for offering nonschoolaged children breakfast or a morning snack at a school site.](#)

Any student who requests a meal shall be served a nutritionally adequate breakfast and lunch free of charge, each school day. (Education Code 49501.5)

As permitted by law, additional or second meals, adult meals, and other nonprogram foods, such as smart snack compliant food and beverages sold in vending machines, may be sold to students. (Education Code 38082, 49501.5)

Meals may be sold to district employees, Board members, and employees or members of the fund or association maintaining the cafeteria. (Education Code 38082)

CSBA NOTE: Pursuant to Education Code 38082, the Governing Board is authorized to adopt a resolution to permit the serving of meals to individuals and organizations other than those specified in the preceding paragraph. CDE's Nutrition Services Division Management Bulletin SNP-04-2021 states that funds from the National School Lunch or Breakfast Program may not be used to serve any nonstudent, [that the price of an adult meal must fully cover all costs incurred in the production of the meal, including USDA Food fair market value, and that the common practice of 50 cent markup method to price adult meals may not be in compliance with USDA FNS instruction](#). The following optional paragraph is for districts that have adopted such a resolution and should be revised to reflect district practice.

In addition, meals may be sold to nonstudents, including parents/guardians, volunteers, students' siblings, or other individuals, who are authorized by the Superintendent or designee to be on

campus. Any meals served to nonstudents shall not be subsidized by federal or state reimbursements, food service revenues, or U.S. Department of Agriculture (USDA) foods.

CSBA NOTE: Pursuant to Education Code 38084, the district may determine meal prices consistent with the goal of paying the costs of maintaining the cafeterias (exclusive of the costs of housing and equipping cafeterias or other costs determined by Board resolution, which are paid from district funds other than the cafeteria fund, pursuant to Education Code 38100).

Meal prices, as recommended by the Superintendent or designee and approved by the Board, shall be based on the costs of providing food services and consistent with Education Code 38084 and 42 USC 1760.

CSBA NOTE: Pursuant to USDA Memorandum SP 46-2016, districts participating in the National School Lunch and/or Breakfast Program are **mandated** to have a written and clearly communicated meal charge policy. See the accompanying administrative regulation for additional language fulfilling this mandate.

The Superintendent or designee shall establish strategies and procedures for the collection of meal payments. Such procedures shall conform with 2 CFR 200.426 and any applicable CDE guidance. The Superintendent or designee shall clearly communicate these procedures to students and parents/guardians, and shall make this policy and the accompanying administrative regulation available to the public pursuant to Education Code 49557.5.

Cafeteria Fund and Account

CSBA NOTE: Pursuant to Education Code 38090, money received for the sale of food or for any services performed by the cafeterias may be paid into the county treasury to the credit of a "cafeteria fund" for the district.

The Superintendent or designee shall establish a cafeteria fund independent of the district's general fund.

CSBA NOTE: The following optional paragraph may be revised to reflect district practice. 2 CFR Part 200, Appendix VII and [USDA's guidance, "Indirect Costs: Guidance for State Agencies and School Food Authorities,"](#) [USDA Memorandum SP60-2016](#) provide information regarding allowable indirect costs that may be charged to the nonprofit school food service account. Also see the accompanying administrative regulation.

The Superintendent or designee shall ensure that state and federal funds provided through school meal programs are allocated only for purposes related to the operation or improvement of food services and for reasonable and necessary indirect program costs as allowed by law.

CSBA NOTE: Education Code 38103 allows the Board, at its discretion and with the approval of the County Superintendent of Schools who is responsible for a countywide payroll/retirement system under Education Code 42646, to have wages, salaries, and benefits of food service employees paid either from the district's general fund (Option 1 below) or from the district's cafeteria fund (Option 2).



The wages, salaries, and benefits of food service employees shall be paid from the cafeteria fund. (Education Code 38103)

Contracts with Outside Services

CSBA NOTE: The following section is optional. Pursuant to Education Code 45103.5, the district is authorized to contract for consulting services related to food service management. Education Code 45103.5, 42 USC 1758, and 7 CFR 210.16 authorize a district, under specified conditions, and with approval of CDE, to contract with a food service management company to manage food service operations in any district school. See the accompanying administrative regulation for related requirements.

With Board approval, the district may enter into a contract for food service consulting services or management services in one or more district schools. (Education Code 45103.5; 42 USC 1758; 7 CFR 210.16)

Procurement of Foods, Equipment and Supplies

CSBA NOTE: The following two paragraphs reflect requirements for districts participating in the National School Lunch and/or Breakfast Program.

Pursuant to 7 CFR 210.21, districts are required to comply with all requirements for purchasing commercial food products served in the school meal programs, including those outlined in the Buy American provision. USDA's Memorandum SP 38-2017 clarifies that a district participating in the National School Lunch and/or Breakfast Program or any entity purchasing food on its behalf must, to the maximum extent practicable, purchase domestically grown and processed foods, as defined. According to the Memorandum, a domestic commodity or product is deemed to be "substantially using" domestic agricultural commodities when over 51 percent of the final processed product consists of agricultural commodities produced in the United States. Districts should include a Buy American clause in all product specifications, solicitations, purchase orders, and any other procurement documents to ensure contractors are aware of this requirement.

Limited exceptions to the Buy American requirement are described in USDA's Memorandum SP 38-2017. If the district is using one of these exceptions, it must maintain documentation justifying the exception(s).

Pursuant to Education Code 49563, CDE is required to make resources, requirements, and best practices related to the Buy American provision has made information available on its web site and to provide districts with related USDA guidance or regulations as updates are issued. website; see the, "Buy American Provision," section in, "Procurement in the CNPs Frequently Asked Questions".

To the maximum extent practicable, foods purchased for use in school meals by the district or by any entity purchasing food on its behalf shall be domestic commodities or products. Domestic commodity or product means an agricultural commodity that is produced in the United States and a food product that is processed in the United States substantially using agricultural commodities that are produced in the United States. (42 USC 1760; 7 CFR 210.21)

CSBA NOTE: Pursuant to Food and Agriculture Code 58596.3, as added by SB 490 (Ch. 602, Statutes of 2022), commencing on January 1, 2024, districts participating in the National School Lunch and/or Breakfast Program, except those with annual reimbursement of less than \$1,000,000, are also required to comply with the requirements specified in the following paragraph.

When soliciting for bids and contracts for the purchase of an agricultural food product, the district shall specify in the solicitation that only the purchase of agricultural food products grown, packed, or processed domestically is authorized, unless a specific exception applies. A nondomestic food product may be purchased for use in the district's food service program only as a last resort when the product is not produced or manufactured in the United States in sufficient and reasonably available quantities of a satisfactory quality, ~~or when competitive bids reveal the costs~~ quality of a ~~United States~~ the domestic product are significantly higher than is inferior to the quality of the nondomestic product, or the bid or price of the nondomestic product is more than 25 percent lower than the bid or price of the domestic product. In such cases, the Superintendent or designee shall retain documentation justifying the use of the exception:

Furthermore, for three years from the date of purchase. (Food and Agriculture Code 58596.3)

CSBA NOTE: The following paragraph applies to all districts, whether or not they participate in the National School Lunch or Breakfast Program. Food and Agriculture Code 58595, as amended by AB 778 (Ch. 576, Statutes of 2022), requires a district shall to accept a bid or price for an agricultural food product grown in California before accepting a bid or price for an a domestic agricultural food product that is grown outside the state, when the conditions specified below are met.]

Furthermore, the district shall accept a bid or price for an agricultural food product grown in California before accepting a bid or price for a domestic agricultural food product that is grown outside the state, if the quality of the California-grown product is comparable and the bid or price does not exceed the lowest bid or price of a for domestic product produced outside the state. (Food and Agriculture Code 58595)

CSBA NOTE: Pursuant to Public Contract Code 20111, districts participating in a federally funded child nutrition program, such as the National School Lunch and/or Breakfast Program, must comply with the federal procurement standards of 2 CFR 200.318-200.326 in regard to bid solicitations and awards. Also see BP/AR 3230 - Federal Grant Funds. Districts that do not participate in such a program may revise the following paragraph.

Bid solicitations and awards for purchases of equipment, materials, or supplies in support of the district's child nutrition program, or for contracts awarded pursuant to Public Contract Code 2000, shall be consistent with the federal procurement standards in 2 CFR 200.318-200.326. Awards shall be let to the most responsive and responsible party. Price shall be the primary consideration, but not the only determining factor, in making such an award. (Public Contract Code 20111)

Program Monitoring and Evaluation

The Superintendent or designee shall present to the Board, at least annually, financial reports regarding revenues and expenditures related to the food service program.

CSBA NOTE: The following paragraph is for use by districts that have one or more schools participating in the National School Lunch Program, School Breakfast Program, Seamless Summer Feeding Option, and/or other federal meal program. The state monitoring process (the Administrative Review) includes a review of district compliance with requirements for federal meal programs, including a review of resource management in the food service program as provided in

the following paragraph. The CDE performs an ~~Administrative Review~~[administrative review](#) of participating districts every three years. See CDE's nutrition services ~~web site~~[website](#) for a current list of documents that may be requested for the review.

The Superintendent or designee shall provide all necessary documentation required for the Administrative Review conducted by CDE to ensure compliance of the district's food service program with federal requirements.

Policy Reference UPDATE Service

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Policy Reference Disclaimer:

These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State	Description
5 CCR 15550-15565	School lunch and breakfast programs
12 CCR 18928-18998.4	Short-lived climate pollutants
Ed. Code 38080-38086	School meals
Ed. Code 38090-38095	Cafeterias; funds and accounts
Ed. Code 38100-38103	Cafeterias; allocation of charges
Ed. Code 42646	Alternate payroll procedure
Ed. Code 45103.5	Contracts for management consulting services; restrictions
Ed. Code 49490-49494	School breakfast and lunch programs
Ed. Code 49500-49505	School meals
Ed. Code 49550-49564.5	Meals for needy students
Ed. Code 49554	Contract for services
Ed. Code 49580-49581	Food recovery program
F&A Code 58595	Preference for California-grown agricultural products
F&A Code 58596.1-58596.5	Buy American Food Act; purchase of nondomestic agricultural food products
H&S Code 113700-114437	California Retail Food Code; sanitation and safety requirements
Pub. Cont. Code 2000-2002	Responsive bidders
Pub. Cont. Code 20111	Contracts over \$50,000; contracts for construction; award to lowest responsible bidder
Pub. Cont. Code 3410	U.S. produce and processed foods
Federal	Description

2 CFR 200	Appendix VII Indirect cost proposals
2 CFR 200.318-200.326	Procurement standards
2 CFR 200.400-200.475	Cost principles
2 CFR 200.56	Indirect costs; definition
42 USC 1751-1769j	School Lunch Program
42 USC 1771-1793	Child Nutrition Act
42 USC 1773	School Breakfast Program
7 CFR 210.1-210.31	National School Lunch Program
7 CFR 210.1-210.33	National School Lunch Program
7 CFR 220.1-220.21	National School Breakfast Program
7 CFR 220.1-220.22	National School Breakfast Program
7 CFR 245.8	Nondiscrimination practices for students eligible for free and reduced price meal and free milk
7 CFR 250.1-250.70	USDA foods

Management Resources

Description

CA Department of Education Publication	California School Accounting Manual (https://www.cde.ca.gov/fg/ac/sa/)
California Department of Education Publication	Pricing of Adult Meals in the National School Lunch and School Breakfast Programs, NSD Management Bulletin, SNP-04-2021, August 2021 (https://www.cde.ca.gov/ls/nu/sn/mbsnp042021.asp)
California Department of Education Publication	Procuring and Monitoring of Food Service Management Contracts, NSD Management Bulletin, SNP-13-2015, January 2015 (https://www.cde.ca.gov/ls/nu/sn/mbsnp132015.asp)
California Department of Education Publication	Cafeteria Funds— NSD Allowable Uses, NSD Management Bulletin, NSD SNP-05-2020, February 2020 (https://www.cde.ca.gov/ls/nu/sn/mbsnp052020.asp)
California Department of Education Publication	Excess Net Cash Resources – Revised to Increase Limitation, NSD Management Bulletin, SNP-04-2022, May 2022 (https://www.cde.ca.gov/ls/nu/sn/mbsnp042022.asp)
California Department of Education Publication	Unpaid Meal Charges: Local Meal Charge Policies, Clarification on Collection of Delinquent Meal Payments, and Excess Student Account Balances, NSD Management Bulletin, SNP-04-2023, July 2023 (https://www.cde.ca.gov/ls/nu/sn/mbsnp042023.asp)
California Department of Education Publication	Food Service Management Company Contract Preapproval, NSD Management Bulletin, SNP-05-2023, March 2023 (https://www.cde.ca.gov/ls/nu/sn/mbsnp052523.asp)

California Department of Education <u>Social Services</u> Publication	Food Distribution Program Administrative Manual (https://www.cdss.ca.gov/cacfp/resources/cacfp-administrative-manual)
California Department of Education Publication	Storage and Inventory Management of U.S. Department of Agriculture Foods, NSD Management Bulletin, FDP-01-2018, January 2018 (https://www.cde.ca.gov/ls/nu/fd/mbfdp012018.asp)
<u>U.S. Department of Agriculture Publication</u>	<u>Procuring Local Foods for Child Nutrition Programs, January 2022</u> (https://www.fns.usda.gov/f2s/procuring-local-foods)
U.S. Department of Agriculture Publication	Indirect Costs: Guidance for State Agencies and School Food Authorities, SP 60-2016, September 2016 (https://www.fns.usda.gov/cn/indirect-cost-guidance)
<u>U.S. Department of Agriculture Publication</u>	<u>Buy American and the Agriculture Improvement Act of 2018, SP-32-2019, August 2019</u> (https://www.fns.usda.gov/cn/buy-american-and-agriculture-improvement-act)
U.S. Department of Agriculture Publication	Compliance with and Enforcement of the Buy American Provision in the National School Lunch Program, SP-38-2017, June 2017 (https://www.fns.usda.gov/nslp/compliance-enforcement-buy-american)
U.S. Department of Agriculture Publication	Discretionary Elimination of Reduced Price Charges in the School Meal Programs, SP 17-2014, January 2014 (https://www.fns.usda.gov/cn/discretionary-elimination-reduced-price-charges-school-meal-programs)
U.S. Department of Agriculture Publication	Unpaid Meal Charges: Local Meal Charge Policies, SP-46-2016, July 2016 (https://www.fns.usda.gov/cn/unpaid-meal-charges-local-meal-charge-policies)
U.S. Dept of Agriculture Publication	School Meals – FAQs (https://www.fns.usda.gov/cn/school-meals-faqs)
Website	CSBA District and County Office of Education Legal Services
Website	U.S. Department of Agriculture, Food and Nutrition Service
Website	California Department of Education, Nutrition Services Division
<u>Website</u>	<u>California Department of Education, Accounting</u> (https://www.cde.ca.gov/fg/ac/)
<u>Website</u>	<u>CalRecycle, Resources for Local Education Agencies: K-12 Public Schools and School Districts</u> (https://calrecycle.ca.gov/organics/slcp/schools/)
Website	California School Nutrition Association

Cross References

Code	Description
0410	Nondiscrimination In District Programs And Activities

1113	District And School Websites
1113	District And School Websites
1113-E(1)	District And School Websites
1340	Access To District Records
1340	Access To District Records
3100	Budget
3100	Budget
3110	Transfer Of Funds
3230	Federal Grant Funds
3230	Federal Grant Funds
3260	Fees And Charges
3260	Fees And Charges
3300	Expenditures And Purchases
3311	Bids
3311	Bids
3312	Contracts
3314.2	Revolving Funds
3400	Management Of District Assets/Accounts
3400	Management Of District Assets/Accounts
3460	Financial Reports And Accountability
3460	Financial Reports And Accountability
3510	Green School Operations
3511	Energy And Water Management
3511	Energy And Water Management
3512	Equipment
3512-E(1)	Equipment
3515.6	Criminal Background Checks For Contractors
3550	Food Service/Child Nutrition Program
3550	Food Service/Child Nutrition Program
3552	Summer Meal Program
3552	Summer Meal Program
3553	Free And Reduced Price Meals
3553	Free And Reduced Price Meals

3554	Other Food Sales
3554	Other Food Sales
3555	Nutrition Program Compliance
3555-E(1)	Nutrition Program Compliance
3580	District Records
3580	District Records
4112.4	Health Examinations
4212	Appointment And Conditions Of Employment
4212.4	Health Examinations
4231	Staff Development
4312.4	Health Examinations
4331	Staff Development
5030	Student Wellness
5145.6	Parent/Guardian Notifications
5145.6-E(1)	Parent/Guardian Notifications

Regulation 3551: Food Service Operations/Cafeteria Fund

Status: ADOPTED

Original Adopted Date: 03/01/2018 | **Last Revised Date:** 06/09/01/20222023 | **Last Reviewed Date:** 06/09/01/20222023

CSBA NOTE: With the establishment of the California Universal Meal Program pursuant to Education Code 49501.5, as added by AB 130 (Ch. 44, Statutes of 2021), all public schools in California must provide free of charge, a nutritionally adequate breakfast and lunch to any student who requests a meal, regardless of the student's free or reduced-price meal eligibility status. To receive state reimbursement for the two meals, districts must participate in both the National School Lunch Program and the School Breakfast Program and comply with the requirement to have a written and clearly communicated meal charge policy as **mandated** pursuant to U.S. Department of Agriculture's (USDA) Memorandum SP 46-2016. However, some requirements of the National School Lunch Program and/or School Breakfast Program are no longer applicable.

The California Department of Education's (CDE) Nutrition Services Division Management Bulletin SNP-04-2023 clarifies that districts that operate a non-pricing program such as the California Universal Meals Program, the Community Eligibility Program, or Provision 2 at all sites are not required to establish a meal charge policy because no students are charged for meals. However, if any school in the district charges for meals because it does not only operate a non-pricing program at all sites, the district is mandated to adopt and communicate a meal charge policy.

In view of the potential conflict between the federal requirement and CDE guidance, it is recommended that districts adopt this administrative regulation and accompanying Board policy which addresses meal charges, even if the district operates a non-pricing program such as the California Universal Meals Program. Districts with questions about meal charge policies should consult CSBA's District and County Offices of Education or district legal counsel.

The district may revise the following paragraphs accordingly.

Payments for Meals

The Superintendent or designee shall maintain a system for accurately recording payments received and tracking meals provided to each student.

At the beginning of the school year, the Superintendent or designee shall communicate the district's meal payment policies through multiple methods, including, but not limited to:

1. Explaining the meal charge policy within registration materials provided to parents/guardians at the start of the school year
2. Including the policy in print versions of student handbooks, if provided to parents/guardians annually
3. Providing the policy whenever parents/guardians are notified regarding the application process for free and reduced-price meals, such as in the distribution of eligibility forms at the start of the school year
4. Posting the policy on the district's ~~web site~~ website

Reimbursement Claims

CSBA NOTE: To streamline administration of state and federal meal programs, the California Department of Education (CDE) CSBA NOTE: Pursuant to Education Code 49501.5, as amended by SB 114 (Ch. 48, Statutes of 2023), CDE is required to provide state meal reimbursement to districts that participate in, and meet the requirements of, the federal School Breakfast Program and National School Lunch Program, and any applicable state laws or regulations, for reduced-price and paid meals served to students. For additional information on California's Universal Meals Program, see BP/AR 3550 – Food Service/Child Nutrition Program and BP/AR 3553 – Free and Reduced Price Meals.

To streamline administration of state and federal meal programs, CDE has developed an online Child Nutrition Information and Payment System which must be used to submit reimbursement claims and to submit and track the status of applications and USDA food requests.

The Superintendent or designee shall maintain records of the number of meals served each day by school site and by category of free and reduced-price meals. The Superintendent or designee shall submit reimbursement claims for school meals to the California Department of Education (CDE) using the online Child Nutrition Information and Payment System.

Donation of Leftover Food

~~To~~The District shall take steps to minimize food waste and reduce food insecurity; in district schools. (Health and Safety Code 114079)

CSBA NOTE: Beginning January 1, 2024, districts with an on-site food facility, such as a school cafeteria, are required to donate edible food that would otherwise be thrown away to a food recovery organization, unless the district demonstrates the existence of extraordinary circumstances beyond its control that makes such compliance impracticable. Additionally, pursuant to 14 CCR 18995.1 and 18995.4, beginning January 1, 2024, districts with an on-site food facility will be inspected by the governmental entity that provides solid waste collection services regarding its edible food recovery program and may be issued a Notice of Violation for noncompliance. If a Notice of Violation is issued, compliance is required within 60 days, unless extended by the enforcing agency because compliance is impracticable due to extenuating circumstances, as specified in 14 CCR 18991.3. For more information regarding organic waste reduction requirements, including a model edible food recovery agreement, see CalRecycle's, "Resources for Local Education Agencies: K-12 Public Schools and School Districts," available on its website. Also see BP/AR 3511.1 -- Integrated Waste Management for additional requirements related to waste diversion and recovery.

The Superintendent or designee shall arrange to recover the maximum amount of edible food that would otherwise be disposed for donation to a local food recovery organization. (14 CCR 18991.3)

The district may also provide sharing tables where students and staff may return appropriate unused cafeteria food items to be made available to students during the course of a regular school meal time. If food on the sharing tables is not taken by a student, the school cafeteria may donate the food to a food bank or any other nonprofit charitable organization. (Health and Safety Code 114079)

Food that may be donated includes prepackaged, nonpotentially hazardous food with the packaging still intact and in good condition, whole uncut produce that complies with Health and Safety Code 113992, unopened bags of sliced fruit, unopened containers of milk that are immediately stored in a

cooling bin maintained at 41 degrees Fahrenheit or below, and perishable prepackaged food if it is placed in a proper temperature-controlled environment. The preparation, safety, and donation of food shall be consistent with Health and Safety Code 113980. (Health and Safety Code 114079)

The Superintendent or designee shall maintain records related to edible food recovery including a list of each food recovery service or organization that collects or receives the district's edible food, contact information for the service or organization, the types of food, frequency, and quantity that will be collected or hauled by the district, and a copy of contracts or written agreements between the district and food recovery services or organizations. (14 CCR 18991.4)

Cafeteria Fund and Account

CSBA NOTE: Education Code 38093 authorizes the Governing Board to establish one or more cafeteria revolving accounts to be treated as revolving cash accounts of the cafeteria fund.

All proceeds from food sales and other services offered by the cafeteria shall be deposited in the cafeteria fund as provided by law. (Education Code 38090, 38093)

CSBA NOTE: Education Code 38101 permits a district, with approval from CDE, to utilize cafeteria funds to pay for the purchase of a mobile food facility. However, if the district uses federal reimbursements from any of the federal child nutrition programs for such purchase, the mobile food facility shall only be used to support the administration of those federal programs. Mobile food facilities used for any purposes other than to support the administration of federal child nutrition programs shall not be purchased with cafeteria funds.

The cafeteria fund shall be used only for those expenditures authorized by the Governing Board as necessary for the operation of school cafeterias in accordance with Education Code 38100-38103, 2 CFR Part 200 Appendix VII, and the California School Accounting Manual.

CSBA NOTE: The following paragraph is optional. By law, cafeteria funds may be used for the operation and improvement of school food services. For example, pursuant to Education Code 49550.5, districts may use cafeteria funds to supplement the cost of providing universal breakfast provided they submit the required certification to CDE.

The district may use cafeteria funds to supplement the provision of a nutritionally adequate breakfast and/or lunch to district students when permitted by law.

Any charges to, or transfers from, a food service program shall be dated and accompanied by a written explanation of the purpose of and basis for the expenditure. (Education Code 38101)

CSBA NOTE: The following optional paragraph may be revised to reflect district practice. 2 CFR Part 200 Appendix VII and USDA's guidance, "SP 60-2016," and CDE's website, "[Frequently Asked Questions about Indirect Costs: Guidance for State Agencies and School Food Authorities](#)," provide information regarding allowable indirect costs that may be charged to the nonprofit school food service account. Indirect costs are those that are incurred for the benefit of multiple programs or objectives and typically support administrative overhead functions (e.g., accounting, payroll, purchasing, utilities, janitorial services). Each program or objective that benefits from the indirect cost bears a commensurate portion of the cost. Costs may be charged to the nonprofit food service account only if properly documented.

Indirect costs charged to the food service program shall be based on either the district's prior year indirect cost rate as approved by CDE or the statewide average approved indirect cost rate for the second prior fiscal year, whichever is less. (Education Code 38101)

CSBA NOTE: Pursuant to 7 CFR 210.14 and 220.7, net cash resources (i.e., all monies that have accrued to the nonprofit school food service at any given time, less cash payable) should not

exceed three months' average expenditures- or such other amount as may be approved by CDE. If there is a surplus, then according to USDA's guidance, "Indirect Costs: Guidance for State Agencies and School Food Authorities," the district must lower the price of paid lunches, improve food quality, or make other improvements to school meal operations. CDE's Nutrition Services Division Management Bulletin NSD-SNP-07-2013 provides 04-2022 states that in an effort to provide flexibility to districts affected by various natural disasters and recovery from the COVID-19 pandemic, CDE may approve a district's has increased the excess net cash resources in an amount greater than three months' limitation to six months' average operating expenditures if the district has a spending plan for the excess funds in place with the Nutrition Services Division.

Net cash resources in the nonprofit school food service shall not exceed ~~three~~six months' average expenditures. (7 CFR 210.14, 220.7)

U.S. Department of Agriculture Foods

CSBA NOTE: The following optional section is for use by districts that participate in the National School Lunch Program and receive foods from USDA pursuant to 42 USC 1755 and 7 CFR 250.1-250.70. CDE is responsible for ordering and distributing USDA foods for use in California schools.

The district shall provide facilities for the storage and control of foods received through the U.S. Department of Agriculture (USDA) that protect against theft, spoilage, damage, or other loss. Such storage facilities shall maintain donated foods in sanitary conditions, at the proper temperature and humidity, and with adequate air circulation. The district shall comply with all federal, state, or local requirements related to food safety and health and procedures for responding to a food recall, as applicable, and shall obtain all required health inspections. (7 CFR 250.14)

The Superintendent or designee shall maintain inventories of USDA foods in accordance with 7 CFR 250.59 and CDE procedures, and shall ensure that foods are used before their expiration dates.

USDA donated foods shall be used in school lunches as far as practicable. USDA foods also may be used in other nonprofit food service activities, including, but not limited to, school breakfasts or other meals, a la carte foods sold to students, meals served to adults directly involved in the operation and administration of the food service and to other school staff, and training in nutrition, health, food service, or general home economics instruction for students, provided that any revenues from such activities accrue to the district's nonprofit food service account. (7 CFR 250.59)

Contracts with Outside Services

CSBA NOTE: The following optional section is for use by districts that contract for food service management services pursuant to Education Code 49554, 42 USC 1758, or 7 CFR 210.16 or consulting services pursuant to Education Code 45103.5, and should be modified to reflect the type(s) of contracts the district maintains; see the accompanying Board policy.

Pursuant to CDE's Nutrition Services Division Management Bulletin SNP-05-2023, a district that participates in the School Nutrition Programs must obtain prior CDE approval for all food service management company Request for Proposals, Invitation for Bids, proposed contracts, contracts, and contract amendments. Districts currently using, or planning to use, the services of a food service management company must conduct a competitive procurement process. CDE suggests districts submit their bid solicitation documents in January, or at least 120 days prior to the anticipated contract execution date, whichever comes first. See AR 3311 – Bids for additional information on bidding requirements.

The term of any contract for food service management or consulting services shall not exceed one year. Any renewal of the contract or further requests for proposals to provide such services shall be considered on a year-to-year basis. (Education Code 45103.5; 7 CFR 210.16)

Any contract for management of the food service operation shall be approved by CDE and comply with the conditions in Education Code 49554 and 7 CFR 210.16 as applicable. The district shall retain control of the quality, extent, and general nature of its food services. (Education Code 49554; 42 USC 1758; 7 CFR 210.16)

Any contract for consulting services shall not result in the supervision of food service classified staff by the management consultant, nor shall it result in the elimination of any food service classified staff or position or have any adverse effect on the wages, benefits, or other terms and conditions of employment of classified food service staff or positions. All persons providing consulting services shall be subject to applicable employment conditions related to health and safety as listed in Education Code 45103.5. (Education Code 45103.5)

Policy Reference UPDATE Service

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Policy Reference Disclaimer:

These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State	Description
5 CCR 15550-15565	School lunch and breakfast programs
<u>12 CCR 18928-18998.4</u>	<u>Short-lived climate pollutants</u>
Ed. Code 38080-38086	School meals
Ed. Code 38090-38095	Cafeterias; funds and accounts
Ed. Code 38100-38103	Cafeterias; allocation of charges
Ed. Code 42646	Alternate payroll procedure
Ed. Code 45103.5	Contracts for management consulting services; restrictions
Ed. Code 49490-49494	School breakfast and lunch programs
Ed. Code 49500-49505	School meals
Ed. Code 49550-49564.5	Meals for needy students
Ed. Code 49554	Contract for services
Ed. Code 49580-49581	Food recovery program
F&A Code 58595	Preference for California-grown agricultural products
<u>F&A Code 58596.1-58596.5</u>	<u>Buy American Food Act; purchase of nondomestic agricultural food products</u>
H&S Code 113700-114437	California Retail Food Code; sanitation and safety requirements

Pub. Cont. Code 2000-2002	Responsive bidders
Pub. Cont. Code 20111	Contracts over \$50,000; contracts for construction; award to lowest responsible bidder
<u>Pub. Cont. Code 3410</u>	<u>U.S. produce and processed foods</u>
Federal	Description
2 CFR 200	Appendix VII Indirect cost proposals
2 CFR 200.318-200.326	Procurement standards
2 CFR 200.400-200.475	Cost principles
2 CFR 200.56	Indirect costs; definition
42 USC 1751-1769j	School Lunch Program
42 USC 1771-1793	Child Nutrition Act
42 USC 1773	School Breakfast Program
7 CFR 210.1-210.31	National School Lunch Program
7 CFR 210.1-210.33	National School Lunch Program
7 CFR 220.1-220.21	National School Breakfast Program
7 CFR 220.1-220.22	National School Breakfast Program
7 CFR 245.8	Nondiscrimination practices for students eligible for free and reduced price meal and free milk
7 CFR 250.1-250.70	USDA foods
Management Resources	Description
CA Department of Education Publication	California School Accounting Manual (https://www.cde.ca.gov/fg/ac/sa/)
California Department of Education Publication	Pricing of Adult Meals in the National School Lunch and School Breakfast Programs, NSD Management Bulletin, SNP-04-2021, August 2021 (https://www.cde.ca.gov/ls/nu/sn/mbsnp042021.asp)
California Department of Education Publication	Procuring and Monitoring of Food Service Management Contracts, NSD Management Bulletin, SNP-13-2015, January 2015 (https://www.cde.ca.gov/ls/nu/sn/mbsnp132015.asp)
California Department of Education Publication	Cafeteria Funds—Allowable Uses, NSD Management Bulletin, NSD-SNP-05-2020, February 2020 (https://www.cde.ca.gov/ls/nu/sn/mbsnp052020.asp)
<u>California Department of Education Publication</u>	<u>Excess Net Cash Resources – Revised to Increase Limitation, NSD Management Bulletin, SNP-04-2022, May 2022</u> (https://www.cde.ca.gov/ls/nu/sn/mbsnp042022.asp)
<u>California Department of Education Publication</u>	<u>Unpaid Meal Charges: Local Meal Charge Policies, Clarification on Collection of Delinquent Meal Payments, and Excess Student Account Balances, NSD Management Bulletin,</u>

	SNP-04-2023, July 2023 (https://www.cde.ca.gov/ls/nu/sn/mbsnp042023.asp)
California Department of Education Publication	Food Service Management Company Contract Preapproval, NSD Management Bulletin, SNP-05-2023, March 2023 (https://www.cde.ca.gov/ls/nu/sn/mbsnp052523.asp)
California Department of Education Social Services Publication	Food Distribution Program Administrative Manual (https://www.cdss.ca.gov/cacfp/resources/cacfp-administrative-manual)
California Department of Education Publication	Storage and Inventory Management of U.S. Department of Agriculture Foods, NSD Management Bulletin, FDP-01-2018, January 2018 (https://www.cde.ca.gov/ls/nu/fd/mbfdp012018.asp)
U.S. Department of Agriculture Publication	Procuring Local Foods for Child Nutrition Programs, January 2022 (https://www.fns.usda.gov/f2s/procuring-local-foods)
U.S. Department of Agriculture Publication	Indirect Costs: Guidance for State Agencies and School Food Authorities, SP 60-2016, September 2016 (https://www.fns.usda.gov/cn/indirect-cost-guidance)
U.S. Department of Agriculture Publication	Buy American and the Agriculture Improvement Act of 2018, SP-32-2019, August 2019 (https://www.fns.usda.gov/cn/buy-american-and-agriculture-improvement-act)
U.S. Department of Agriculture Publication	Compliance with and Enforcement of the Buy American Provision in the National School Lunch Program, SP-38-2017, June 2017 (https://www.fns.usda.gov/nslp/compliance-enforcement-buy-american)
U.S. Department of Agriculture Publication	Discretionary Elimination of Reduced Price Charges in the School Meal Programs, SP 17-2014, January 2014 (https://www.fns.usda.gov/cn/discretionary-elimination-reduced-price-charges-school-meal-programs)
U.S. Department of Agriculture Publication	Unpaid Meal Charges: Local Meal Charge Policies, SP-46-2016, July 2016 (https://www.fns.usda.gov/cn/unpaid-meal-charges-local-meal-charge-policies)
U.S. Dept of Agriculture Publication	School Meals – FAQs (https://www.fns.usda.gov/cn/school-meals-faqs)
Website	CSBA District and County Office of Education Legal Services
Website	U.S. Department of Agriculture, Food and Nutrition Service
Website	California Department of Education, Nutrition Services Division
Website	California Department of Education, Accounting (https://www.cde.ca.gov/fg/ac/)
Website	CalRecycle, Resources for Local Education Agencies: K-12 Public Schools and School Districts (https://calrecycle.ca.gov/organics/slcp/schools/)

Cross References

Code	Description
0410	Nondiscrimination In District Programs And Activities
1113	District And School Websites
1113	District And School Websites
1113-E(1)	District And School Websites
1340	Access To District Records
1340	Access To District Records
3100	Budget
3100	Budget
3110	Transfer Of Funds
3230	Federal Grant Funds
3230	Federal Grant Funds
3260	Fees And Charges
3260	Fees And Charges
3300	Expenditures And Purchases
3311	Bids
3311	Bids
3312	Contracts
3314.2	Revolving Funds
3400	Management Of District Assets/Accounts
3400	Management Of District Assets/Accounts
3460	Financial Reports And Accountability
3460	Financial Reports And Accountability
3510	Green School Operations
3511	Energy And Water Management
3511	Energy And Water Management
3512	Equipment
3512-E(1)	Equipment
3515.6	Criminal Background Checks For Contractors
3550	Food Service/Child Nutrition Program

3550	Food Service/Child Nutrition Program
3552	Summer Meal Program
3552	Summer Meal Program
3553	Free And Reduced Price Meals
3553	Free And Reduced Price Meals
3554	Other Food Sales
3554	Other Food Sales
3555	Nutrition Program Compliance
3555-E(1)	Nutrition Program Compliance
3580	District Records
3580	District Records
4112.4	Health Examinations
4212	Appointment And Conditions Of Employment
4212.4	Health Examinations
4231	Staff Development
4312.4	Health Examinations
4331	Staff Development
5030	Student Wellness
5145.6	Parent/Guardian Notifications
5145.6-E(1)	Parent/Guardian Notifications

Policy 4151: Employee Compensation

Status: ADOPTED

Original Adopted Date: 02/01/1997 | **Last Revised Date:** 05/09/01/20202023 | **Last Reviewed Date:** 05/09/01/20202023

CSBA NOTE: Districts that include provisions related to employee compensation in their collective bargaining agreements should modify or delete the following optional policy accordingly.

In order to recruit and retain employees committed to the district's goals for student learning, the Governing Board recognizes the importance of offering a competitive compensation package which includes salaries and health and welfare benefits.

CSBA NOTE: Education Code 45023 and 45162 require the Governing Board to adopt salary schedules for certificated and classified employees, respectively. For districts operating under a merit system, Education Code 45268 specifies that the personnel commission will recommend a salary schedule for classified employees to the Board for approval and that the Board may not amend the schedule without first giving the commission an opportunity to respond to the amendments.

The Board shall adopt separate salary schedules for certificated, classified, and supervisory and administrative personnel. These schedules shall comply with law and collective bargaining agreements and shall be printed and made available for review at the district office. (Education Code 45022, 45023, 45160, 45162, 45268)

Each certificated employee, except an employee in an administrative or supervisory position, shall be classified on the salary schedule on the basis of uniform allowance for education level and years of experience, unless the Board and employee organization negotiate and mutually agree to a salary schedule based on different criteria. Certificated employees shall not be placed in different classifications on the schedule, nor paid different salaries, solely on the basis of the grade levels at which they teach. (Education Code 45028)

Salary schedules for staff who are not a part of a bargaining unit shall be determined by the Board at the recommendation of the Superintendent or designee.

CSBA NOTE: Pursuant to Education Code 45038, certificated employees may be paid once every two weeks, twice a month, or once every four weeks. The Board may also choose to pay certificated employees, or one or more individual employees, in 10, 11, or 12 equal payments over the year. Education Code 45039 provides that, if the Board arranges to pay certificated employees in 12 equal payments for the year, it may pay each monthly installment at the end of each calendar month, regardless of whether ~~or not~~ the employees are engaged in teaching during the month. Education Code 45165 addresses salary payments for classified employees who are employed 9-11 months per year.

Additionally, pursuant to Education Code 45500, districts may participate in the Classified School Employee Summer Assistance Program whereby eligible classified employees may elect to have up to 10 percent of the employee's monthly salary withheld and paid out during the summer recess in

either one or two payments.

Education Code 45048 and 45165 provide specific timelines for issuing salary payments depending on the frequency of payments. If payments are not made in a timely manner, the district is required to pay the employee interest on the unpaid amount.

The following paragraph may be revised to reflect the payroll schedule determined by the Board.

The Board shall determine the frequency and schedule of salary payments, including whether payments for employees who work less than 12 months per year will be made over the course of the school year or in equal installments over the calendar year. (~~Education Code 45038, 45039, 45048, 45165~~ However, if the district participates in the Classified School Employee Summer Assistance Program, eligible classified employees may elect to have up to 10 percent of the employee's monthly salary withheld and paid out during the summer recess in either one or two payments. (Education Code 45038, 45039, 45048, 45165, 45500))

CSBA NOTE: According to Office of Management and Budget Memorandum M-20-17, during extraordinary circumstances, such as a pandemic, which ~~interrupts~~ interrupt district operations, employees paid with federal grant funds can continue to be paid out of federal grant funds as long as other similarly situated employees paid with nonfederal funds are continuing to get compensated. The following optional paragraph establishes such emergency contingencies so that the Board may continue to provide employee compensation during such times.

In extraordinary circumstances or emergency situations, the Board may determine to continue to compensate employees during periods of extended closure or disruption of normal district operations when permitted by law and consistent with collective bargaining agreements and memoranda of understanding.

CSBA NOTE: Pursuant to 29 CFR 516.4, districts are required to post a notice of the minimum wage provisions of the Fair Labor Standards Act (FLSA) (29 USC 201-219) in a conspicuous place at all work sites. The poster that must be used by state and local governments is available on the ~~web site~~ website of the U.S. Department of Labor's Wage and Hour Division.

The Superintendent or designee shall post a notice explaining the Fair Labor Standards Act's wage and hour provisions in a conspicuous place at each work site. (29 CFR 516.4)

Overtime Compensation

CSBA NOTE: Pursuant to the FLSA (29 CFR 553.20) and Education Code 45128, employees who are not specifically exempted by law, including classified employees in both merit and non-merit system districts, must receive overtime pay or compensatory time off at a rate not less than one and one-half times their regular rate of pay for hours worked in excess of eight hours in any one day and /or in excess of 40 hours per calendar week. However, if the Board has established a work day of less than eight hours but at least seven hours, and a work week of less than 40 hours but at least 35 hours, all time worked in excess of the established work schedule must be deemed overtime.

Pursuant to Education Code 45130, districts are not required to pay overtime for any classified positions established by the Board, or by the personnel commission in a merit system district, as supervisory, administrative, or executive. In approving positions for exclusion from the overtime provisions, the Board or personnel commission must certify in writing that the duties, flexibility of

hours, salary, benefit structure, and authority of the positions are of such a nature that they should be set apart from those positions which are subject to the overtime provisions. See: [see](#) BP/AR 4300 - Administrative and Supervisory Personnel. However, Education Code 45130 requires that, if a classified employee in an exempt position is required to work on a holiday designated in law or by the Board, the employee must be paid the regular pay for that day plus compensation or compensatory time off at a rate not less than the employee's normal rate of pay.

Overtime pay requirements are also not applicable to school administrators or teachers in elementary or secondary schools under specific exemptions in 29 USC 213 and 29 CFR 541.303. Pursuant to 29 CFR 541.303 and 541.600, teachers do not need to meet the salary level requirement to be exempt from overtime rules. 29 CFR 541.204 provides that, to be exempt from overtime rules, administrators must either meet the salary level requirement or be compensated on a salary basis that is at least equal to the entrance salary for teachers in the administrator's school.

District employees shall be paid an overtime rate of not less than one and one-half times their regular rate of pay for any hours worked in excess of eight hours in one day [and](#)/or 40 hours in one work week, or twice their regular rate of pay for any hours worked in excess of 12 hours in one day or eight hours on the seventh consecutive day of work. However, teachers, school administrators, and other employees in positions established by the Board as executive, administrative, or professional shall be exempt from overtime rules. (Education Code 45128, 45130; 29 USC 213; 29 CFR 541.0-541.710, 553.27, 553.32)

CSBA NOTE: The following optional paragraph is for use by districts that allow employees to take compensatory time off in lieu of overtime compensation as authorized by 29 USC 207 and 29 CFR 553.20-553.25. Time off in lieu of overtime compensation is allowed only if provided for in a collective bargaining agreement or other agreement and must be provided at the rate of at least one and one-half hours for each hour of overtime work.

Pursuant to 29 CFR 553.21, an employee must be allowed to use earned compensatory time within a "reasonable period" after making the request. 29 CFR 553.25 provides that a "reasonable period" is determined on a case-by-case basis by considering customary work practices such as the normal work schedule, anticipated peak workloads based on past experience, emergency requirements for staff and services, and the availability of qualified substitute staff. Education Code 45129 provides that the compensatory time off must be used within 12 calendar months.

When authorized in a collective bargaining agreement or other agreement between the district and employees, an employee may take compensatory time off in lieu of overtime compensation, provided the employee has not accrued compensatory time in excess of the limits specified in 29 USC 207.

For each nonexempt employee, the Superintendent or designee shall maintain records on the employee's wages, hours, and other information specified in 29 CFR 516.5-516.6.

Wage Overpayment

[CSBA NOTE: Education Code 44042.5, as added by AB 185 \(Ch. 571, Statutes of 2022\) and amended by SB 114 \(Ch. 48, Statutes of 2023\), requires districts to follow the process specified below when a](#)

wage overpayment is made to a district employee. If the provisions of this section are in conflict with a collective bargaining agreement or a memorandum of understanding that was in effect on July 31, 2022, such agreements shall be controlling until the expiration or renewal of such agreements. The district should consult CSBA's District and County Office of Education Legal Services or district legal counsel when questions arise about legal requirements for specific wage overpayments.

If, following the determination of an overpayment, the employee disputes the overpayment, the district shall initiate legal action and obtain a court order or binding arbitration decision. Binding arbitration may only apply to such overpayment disputes if a memorandum of understanding between the district and exclusive representative sets forth procedures for adjudicating such wage overpayment disputes that meet the minimum requirements set forth in Education Code 44042.5.

If the district determines an employee has been overpaid, the district shall notify the employee in writing of the overpayment, afford the employee an opportunity to respond before commencing any recoupment actions, and inform the employee of the employee's rights to dispute the existence or amount of the claimed overpayment. If the employee agrees there was an overpayment in the claimed amount, reimbursement shall be made to the district through one of the methods described in Education Code 44042.5 as mutually agreed upon by the employee and the district. (Education Code 44042.5)

If a mutual agreement on a method of reimbursement is not reached, within 30 days of the employee verifying the overpayment amount, the district shall recoup the overpayment through payroll deductions in accordance with Education Code 44042.5.

If the employee does not respond or disputes the existence or amount of the district's claimed overpayment, the district shall, with board approval, initiate a legal action to recover the overpayment. (Education Code 44042.5)

If the employee separates from the district before the overpayment is fully repaid, the district shall withhold the remaining balance due from any money owed to the employee upon separation, provided that the state minimum wage is still paid to the employee as required by Education Code 44042.5. The Superintendent or designee may consult with legal counsel to calculate the amount to withhold.

If an outstanding overpayment balance still remains, the district shall, with Board approval, exercise any legal means to recover the remaining amount owed by the employee. (Education Code 44042.5)

Legal action to recover any overpayment under this policy shall be initiated within three years from the date of the overpayment, which for leave credits is the date that the employee receives compensation in exchange for leave erroneously credited to the employee. (Education Code 44042.5)

Policy Reference UPDATE Service

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Policy Reference Disclaimer:

These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State

Description

8 CCR 11040	Wages and hours; definitions of administrative, executive, and professional employees
Ed. Code 44042.5	Wage overpayment
Ed. Code 45022-45061.5	Salaries
Ed. Code 45023	Availability of salary schedule
Ed. Code 45028	Salary schedule and exceptions
Ed. Code 45127-45133.5	Classified employees; work week; overtime provisions
Ed. Code 45160-45169	Salaries for classified employees
Ed. Code 45268	Salary schedule for classified service in merit system districts
Ed. Code 45500	Classified School Employee Summer Assistance Program
Gov. Code 3540-3549	Meeting and negotiating
Gov. Code 3543.2	Scope of representation
Gov. Code 3543.7	Duty to meet and negotiate in good faith
Lab. Code 226	Employee access to payroll records
Lab. Code 232	Disclosure of wages
Federal	Description
26 CFR 1.409A-1	Definitions and covered plans
26 USC 409A	Deferred compensation plans
29 CFR 516.4	Notice of minimum wage and overtime provisions
29 CFR 516.5-516.6	Records
29 CFR 541.0-541.710	Exemptions for executive, administrative, and professional employees
29 CFR 553.1-553.51	Fair Labor Standards Act; applicability to public agencies
29 USC 201-219	Fair Labor Standards Act
29 USC 203	Definitions
29 USC 207	Fair Labor Standards Act
29 USC 213	Exemptions from minimum wage and overtime requirements
Management Resources	Description
Court Decision	Flores v. City of San Gabriel, (9th Cir., June 2, 2016, No. 14-56421) 824 F.3d 890
Office of Management and Budget Publication	Administrative Relief for Recipients and Applicants of Fed. Fin. Assist. Federal Financial Assistance Directly Impacted by COVID-19 Due due to Loss of Operations , Memo M-20-17, March 19, 2020

Website	CSBA District and County Office of Education Legal Services
Website	U.S. Department of Labor, Wage and Hour Division
Website	Internal Revenue Service
Website	School Services of California, Inc.
Website	CSBA

Cross References

Code	Description
0470	COVID-19 Mitigation Plan
3100	Budget
3100	Budget
3400	Management Of District Assets/Accounts
3400	Management Of District Assets/Accounts
3580	District Records
3580	District Records
4000	Concepts And Roles
4030	Nondiscrimination In Employment
4030	Nondiscrimination In Employment
4112.6	Personnel Files
4113.5	Working Remotely
4121	Temporary/Substitute Personnel
4121	Temporary/Substitute Personnel
4140	Bargaining Units
4141	Collective Bargaining Agreement
4143	Negotiations/Consultation
4154	Health And Welfare Benefits
4154	Health And Welfare Benefits
4212	Appointment And Conditions Of Employment
4212.6	Personnel Files
4213.5	Working Remotely
4240	Bargaining Units

4241	Collective Bargaining Agreement
4243	Negotiations/Consultation
4254	Health And Welfare Benefits
4254	Health And Welfare Benefits
4312.1	Contracts
4312.6	Personnel Files
4313.5	Working Remotely
4340	Bargaining Units
4354	Health And Welfare Benefits
4354	Health And Welfare Benefits

Regulation 4217.3: Layoff/Rehire

Status: ADOPTED

Original Adopted Date: 11/01/2003 | **Last Revised Date:** ~~1209~~/01/2021~~2023~~ | **Last Reviewed Date:** ~~1209~~/01/2021~~2023~~

CSBA NOTE: The following optional regulation is subject to collective bargaining, and may be deleted by those districts whose agreements fully cover the provisions specified below.

Education Code 45114, 45117, 45298, and 45308 establish the procedures by which the Governing Board may lay off and reemploy classified employees.

Because of the complexity of related Education Code provisions and the interaction with collective bargaining agreements, it is strongly recommended that the district consult with [CSBA's District and County Office of Education Legal Services or district](#) legal counsel before instituting layoff proceedings.

Classified employees shall be subject to layoff for lack of work or lack of funds. (Education Code 45114, 45308)

A classified employee shall not be laid off if a short-term employee is retained to render a service that the classified employee is qualified to render. (Education Code 45117)

Order of Layoff Within a Classification/Determination of Seniority

Within each class, the order of layoff shall be determined by length of service. (Education Code 45114, 45308)

CSBA NOTE: For any district whose average daily attendance (ADA) is under ~~400~~250,000, Education Code 45308, [as amended by SB 913 \(Ch. 920, Statutes of 2022\)](#), defines "length of service" as employees' hours in paid status (Option 1 below). However, such a district may instead choose to enter into an agreement with the exclusive representative of classified employees to determine "length of service" based on an employee's date of hire (Option 2 below).

For any district with an ADA of ~~400~~250,000 or higher, Education Code 45308 requires length of service to be based on the date of hire; such districts should select Option 2 below.

"Date of hire" is not defined in the law and could refer to the employee's first date of hire in the district or the employee's date of hire in the classification or higher classification. Districts selecting Option 2 below may revise the applicable paragraph to reflect the definition determined by the district or by agreement with the exclusive representative of classified employees, as applicable.

Length of service shall be determined by the date of hire. The employee who has been employed the shortest time in the class, plus higher classes, by the district shall be laid off first. (Education Code 45308)

CSBA NOTE: The following paragraph applies to both Options 1 and 2. Pursuant to Education Code 45105 and 45259, persons employed in "restricted positions" are classified employees. However, they do not acquire permanent status or seniority credits unless they satisfy the conditions specified below.

For an employee in a "restricted position" under Education Code 45105 or 45259, the original date of employment in the restricted position shall be used to determine the length of service, provided the employee has completed six months of satisfactory service and has successfully passed the qualifying examination required for service in the class. (Education Code 45105)

Notice of Layoff and Hearing Rights

CSBA NOTE: Education Code 45117 applies to both districts that have adopted the merit system and those that have not. Education Code 45117, as amended by AB 438 (Ch. 665, Statutes of 2021), specifies notice requirements and hearing rights the district must provide to permanent classified employees, as defined, who are subject to layoff due to lack of work or lack of funds, including that notice be given no later than March 15. If a permanent classified employee is not given the required notice and a right to a hearing in accordance with law, the employee is deemed reemployed for the next school year.

Pursuant to Education Code 45117, as amended by AB 438, a "permanent employee" is defined as an employee who was permanent at the time the notice or right to a hearing was required and an employee who became permanent after the date of the required notice.

Whenever a permanent classified employee is to be laid off for lack of work or lack of funds, the Superintendent or designee shall, no later than March 15 and before the employee is given formal notice by the Governing Board, give to the employee written notice of the recommendation, the reasons that the employee's services will not be required for the ensuing year, any displacement rights, reemployment rights, and the employee's right to a hearing. The district shall adhere to the notice, hearing, and layoff procedures in Education Code 45117, Government Code 11503 and 11505, and other applicable provisions of law. (Education Code 45117)

An employee who is so notified may request a hearing to determine if there is cause for not reemploying the employee for the ensuing year. The request shall be in writing and shall be delivered to the person who sent notice to the employee, on or before March 15 but not less than seven days after the date the notice is served on the employee. Failure of an employee to request a hearing on or before the date specified shall constitute a waiver of the employee's right to a hearing. (Education Code 45117)

The Superintendent or designee shall serve an employee who timely requests a hearing with the District Statement of Reduction in Force documents. The employee has five calendar days from service of the District Statement of Reduction in Force documents to timely file a notice of participation with the district. The parties are entitled to discovery, if requested within 15 days of service of the District Statement of Reduction in Force documents. (Education Code 45117)

CSBA NOTE: Education Code 45117, as amended by AB 438, allows permanent classified employees given notice of a layoff to request a hearing before an administrative law judge. Education Code 45117, as amended by AB 185 (Ch. 571, Statutes of 2022), authorizes such employee to be represented at the hearing by an attorney or by a nonattorney representative of the employee organization designated as the exclusive representative of the district's classified employees. On or before May 7, the administrative judge is required to submit the proposed decision, containing a determination as to the sufficiency of the cause and a recommendation as to disposition regarding the layoff, to the Board for consideration and to the affected employee(s).

If a hearing is requested by a permanent classified employee, the proceeding shall be conducted and a decision made by an administrative law judge in accordance with Government Code 11500-11529. At the hearing, the employee may be represented by an attorney or by a nonattorney representative of the employee organization designated as the exclusive representative for classified employees. The Board shall make a final decision regarding the sufficiency of the cause and disposition of the layoff upon receipt of the administrative law judge's proposed decision. None of the findings, recommendations, or determinations in the proposed decision prepared by the administrative law judge shall be binding on the Board. (Education Code 45117)

Following the Board's decision, the Superintendent or designee shall give final notice of termination to the affected employee(s) before May 15 unless a continuance was granted after a request for hearing was made, in which case such date may be extended by the number of days of the continuance. (Education Code 45117)

CSBA NOTE: Pursuant to Education Code 45117, as amended by AB 438, the district may reduce classified staff due to lack of work or lack of funds when the Board determines, during the time between five days after the enactment of the Budget Act and August 15, that the district's total local control funding formula apportionment per unit of ADA for the fiscal year of the Budget Act has not increased by at least two percent.

If during the time between five days after the enactment of an annual Budget Act and August 15 of the fiscal year to which the Budget Act applies, the Board determines that the district's local control funding formula apportionment per unit of ADA for that fiscal year has not increased by at least two percent, and that it is therefore necessary to decrease the number of classified employees due to lack of work or lack of funds, the Board may issue a District Statement of Reduction in Force to those employees in accordance with a schedule of notice and hearing adopted by the Board, and layoff proceedings shall be carried out as required by law. (Education Code 45117)

When classified positions are eliminated as a result of the expiration of a specifically funded program, the district shall give written notice to the affected employee(s) not less than 60 days prior to the effective date of the layoff informing the employee(s) of the layoff date, any displacement rights, and employment rights. (Education Code 45117)

The district is not required to provide a layoff notice to any person hired as a short-term employee for a period not exceeding 60 days whose service may not be extended or renewed. (Education Code 45117)

Additionally, the district may release probationary classified employees without notice or hearing for reasons other than lack of work or lack of funds. (Education Code 45117)

Reemployment

CSBA NOTE: The following optional section specifies the rights of employees who are laid off or who take voluntary demotion or reduction in assigned time in lieu of layoff. Pursuant to Education Code 45308, laid-off classified employees have reemployment rights which are enforced in order of seniority rather than reverse order of layoff. In *Tucker v. Grossmont Union High School District*, a California appellate court ruled that a laid-off employee's reemployment right entitled the employee to preference over any new applicant to available positions for which the employee is qualified, including positions in different classes from which the employee was laid off.

Classified employees laid off because of lack of work or lack of funds shall be eligible for reemployment for a period of 39 months and shall be reemployed in preference to new applicants. Reemployment shall be in order of seniority. Persons so laid off also have the right to apply and establish their qualification for vacant promotional positions within the district during the 39-month period. (Education Code 45114, 45298, 45308)

CSBA NOTE: Pursuant to *San Mateo City School District v. Public Employment Relations Board*, districts may adopt procedures which implement Education Code 45113 and 45114 as long as such procedures do not replace or set aside mandatory Education Code provisions. These procedures may be adopted pursuant to Board policy and/or collective bargaining agreement.

The following optional paragraph should be deleted by districts with a collective bargaining agreement that contains reemployment procedures, unless the district also has unrepresented classified employees.

When a vacancy occurs, the district shall give the employee with the most seniority an opportunity to accept or reject the position, by first calling the employee at the employee's last known telephone number to notify the employee of the vacancy and then sending written notice by certified and standard mail to the employee's last known address. The employee shall advise the district of the decision by any means no later than 10 calendar days from the date the notice was sent. If the employee accepts, the employee shall report to work no later than two calendar weeks from the vacancy notification date or on a later date specified by the district.

CSBA NOTE: The following paragraph is optional and may be modified to reflect district practice.

In order to be reemployed, the employee must be capable of performing the essential duties of the job with or without reasonable accommodations. When an otherwise eligible employee is unable to perform the essential duties of the job, the employee shall be kept on the reemployment list until another opportunity becomes available or the period of reemployment eligibility expires, whichever occurs first.

CSBA NOTE: An argument can be made that, absent a collective bargaining provision to the contrary, once a district has offered a laid-off classified employee a position pursuant to the employee's reemployment rights under Education Code 45298 and that employee has refused the position, the district has discharged its duty to that employee. Whether such action conflicts with an employee's statutory right to reemployment is unclear.

The following two optional paragraphs should be used only with the approval of [CSBA's District and County Office of Education Legal Services](#) or the district's legal counsel; the number of refusals that will trigger the removal of the employee's name from the district's reemployment list should be modified accordingly.

Upon rejecting two offers of reemployment, the employee's name shall be removed from the reemployment list and the employee will forfeit all reemployment rights to which the employee would otherwise be entitled.

When an employee is notified of a vacancy and fails to respond or report to work within time limits specified by district procedures, the employee's name shall be removed from the reemployment list and all reemployment rights to which the employee would otherwise be entitled shall be forfeited.

If an employee is reemployed in a new position and fails to complete the probationary period in the new position, the employee shall be returned to the reemployment list for the remainder of the 39-month period. The remaining time period shall be calculated as the time remaining in the 39-month period as of the date of reemployment. (Education Code 45114, 45298)

Reinstatement of Benefits

CSBA NOTE: The following optional section should be deleted by districts that do not reinstate laid-off employee benefits upon reemployment and those whose collective bargaining agreements address the issue.

When a laid-off employee is reemployed, all accumulated sick leave credit shall be restored.

A laid-off permanent employee shall be reemployed with all rights and benefits accorded at the time of layoff.

A laid-off probationary employee shall be reemployed as a probationary employee, and the previous time served toward the completion of the required probationary period shall be counted. The employee shall also be reemployed with all rights and benefits accorded to a probationary employee at the time of layoff.

A laid-off employee, when reemployed, shall be placed on the salary step held at the time of layoff. An employee who was bumped into a lower class shall, when reinstated to the previous class, be placed on the salary step to which the employee would have progressed had the employee remained there. An adjusted anniversary date shall be established for step increment purposes so as to reflect the actual amount of time served in the district.

Voluntary Demotion or Reduction of Hours

Classified employees who take voluntary demotion or voluntary reduction in assigned time in lieu of layoff, or in order to remain in their present position rather than be reclassified or reassigned, shall be granted the same rights as employees who are laid off. In addition, such employees shall retain eligibility to be considered for reemployment in their previously held class or position with increased assigned time, for an additional period of time up to 24 months as determined by the Board on a class-by-class basis, provided that the same test of fitness under which they qualified for appointment to that class shall still apply. (Education Code 45114, 45298)

Employees who take voluntary demotion or voluntary reduction in assigned time in lieu of layoff shall have the option of returning to a position in their former class or to positions with increased assigned time as vacancies become available and without limitation of time. If there is a valid reemployment list, they shall be ranked on that list in accordance with their proper seniority. (Education Code 45114, 45298)

Policy Reference UPDATE Service

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Policy Reference Disclaimer:

These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State	Description
Ed. Code 45101	Definitions; disciplinary action and cause
Ed. Code 45103	Classified service in districts not incorporating the merit system
Ed. Code 45105	Positions under various acts not requiring certification qualifications
Ed. Code 45113	Notification of charges; classified employees
Ed. Code 45114	Layoff and reemployment procedures; definitions
Ed. Code 45115	Layoff; reinstatement from service retirement

Ed. Code 45117	Notice of layoff; classified employees
Ed. Code 45286	Limited term employees
Ed. Code 45297	Right to take equivalent examination while employee in military service
Ed. Code 45298	Reemployment of persons laid off; voluntary demotions or reductions in time
Ed. Code 45308	Order of layoff and reemployment; length of service
Ed. Code 45309	Reinstatement of permanent noncertified employees after resignation
Gov. Code 11500-11529	Administrative adjudication; formal hearings

Federal

38 USC 4301-4335

Description

Employment and reemployment rights of members of the uniformed services

Management Resources

Court Decision

Description

San Mateo City School District v. Public Employment Relations Board (1983) 33 Cal.3d 850

Court Decision

Tucker v. Grossmont Union High School District (2008) 168 Cal.App.4th 640

Website

CSBA District and County Office of Education Legal Services

Website

California School Employees Association

Cross References

Code

1240

Description

Volunteer Assistance

1240

Volunteer Assistance

4032

Reasonable Accommodation

4112.9

Employee Notifications

4112.9-E(1)

Employee Notifications

4121

Temporary/Substitute Personnel

4121

Temporary/Substitute Personnel

4161.11

Industrial Accident/Illness Leave

4161.5

Military Leave

4161.8

Family Care And Medical Leave

4200	Classified Personnel
4200	Classified Personnel
4212.9	Employee Notifications
4212.9-E(1)	Employee Notifications
4261.1	Personal Illness/Injury Leave
4261.11	Industrial Accident/Illness Leave
4261.5	Military Leave
4261.8	Family Care And Medical Leave
4312.9	Employee Notifications
4312.9-E(1)	Employee Notifications
4361.11	Industrial Accident/Illness Leave
4361.5	Military Leave
4361.8	Family Care And Medical Leave

Policy 4251: Employee Compensation

Status: ADOPTED

Original Adopted Date: 02/01/1997 | **Last Revised Date:** 05/09/01/20202023 | **Last Reviewed Date:** 05/09/01/20202023

CSBA NOTE: Districts that include provisions related to employee compensation in their collective bargaining agreements should modify or delete the following optional policy accordingly.

In order to recruit and retain employees committed to the district's goals for student learning, the Governing Board recognizes the importance of offering a competitive compensation package which includes salaries and health and welfare benefits.

CSBA NOTE: Education Code 45023 and 45162 require the Governing Board to adopt salary schedules for certificated and classified employees, respectively. For districts operating under a merit system, Education Code 45268 specifies that the personnel commission will recommend a salary schedule for classified employees to the Board for approval and that the Board may not amend the schedule without first giving the commission an opportunity to respond to the amendments.

The Board shall adopt separate salary schedules for certificated, classified, and supervisory and administrative personnel. These schedules shall comply with law and collective bargaining agreements and shall be printed and made available for review at the district office. (Education Code 45022, 45023, 45160, 45162, 45268)

Each certificated employee, except an employee in an administrative or supervisory position, shall be classified on the salary schedule on the basis of uniform allowance for education level and years of experience, unless the Board and employee organization negotiate and mutually agree to a salary schedule based on different criteria. Certificated employees shall not be placed in different classifications on the schedule, nor paid different salaries, solely on the basis of the grade levels at which they teach. (Education Code 45028)

Salary schedules for staff who are not a part of a bargaining unit shall be determined by the Board at the recommendation of the Superintendent or designee.

CSBA NOTE: Pursuant to Education Code 45038, certificated employees may be paid once every two weeks, twice a month, or once every four weeks. The Board may also choose to pay certificated employees, or one or more individual employees, in 10, 11, or 12 equal payments over the year. Education Code 45039 provides that, if the Board arranges to pay certificated employees in 12 equal payments for the year, it may pay each monthly installment at the end of each calendar month, regardless of whether ~~or not~~ the employees are engaged in teaching during the month. Education Code 45165 addresses salary payments for classified employees who are employed 9-11 months per year.

Additionally, pursuant to Education Code 45500, districts may participate in the Classified School Employee Summer Assistance Program whereby eligible classified employees may elect to have up to 10 percent of the employee's monthly salary withheld and paid out during the summer recess in

either one or two payments.

Education Code 45048 and 45165 provide specific timelines for issuing salary payments depending on the frequency of payments. If payments are not made in a timely manner, the district is required to pay the employee interest on the unpaid amount.

The following paragraph may be revised to reflect the payroll schedule determined by the Board.

The Board shall determine the frequency and schedule of salary payments, including whether payments for employees who work less than 12 months per year will be made over the course of the school year or in equal installments over the calendar year. (~~Education Code 45038, 45039, 45048, 45165~~ However, if the district participates in the Classified School Employee Summer Assistance Program, eligible classified employees may elect to have up to 10 percent of the employee's monthly salary withheld and paid out during the summer recess in either one or two payments. (Education Code 45038, 45039, 45048, 45165, 45500))

CSBA NOTE: According to Office of Management and Budget Memorandum M-20-17, during extraordinary circumstances, such as a pandemic, which ~~interrupts~~ interrupt district operations, employees paid with federal grant funds can continue to be paid out of federal grant funds as long as other similarly situated employees paid with nonfederal funds are continuing to get compensated. The following optional paragraph establishes such emergency contingencies so that the Board may continue to provide employee compensation during such times.

In extraordinary circumstances or emergency situations, the Board may determine to continue to compensate employees during periods of extended closure or disruption of normal district operations when permitted by law and consistent with collective bargaining agreements and memoranda of understanding.

CSBA NOTE: Pursuant to 29 CFR 516.4, districts are required to post a notice of the minimum wage provisions of the Fair Labor Standards Act (FLSA) (29 USC 201-219) in a conspicuous place at all work sites. The poster that must be used by state and local governments is available on the ~~web site~~ website of the U.S. Department of Labor's Wage and Hour Division.

The Superintendent or designee shall post a notice explaining the Fair Labor Standards Act's wage and hour provisions in a conspicuous place at each work site. (29 CFR 516.4)

Overtime Compensation

CSBA NOTE: Pursuant to the FLSA (29 CFR 553.20) and Education Code 45128, employees who are not specifically exempted by law, including classified employees in both merit and non-merit system districts, must receive overtime pay or compensatory time off at a rate not less than one and one-half times their regular rate of pay for hours worked in excess of eight hours in any one day and /or in excess of 40 hours per calendar week. However, if the Board has established a work day of less than eight hours but at least seven hours, and a work week of less than 40 hours but at least 35 hours, all time worked in excess of the established work schedule must be deemed overtime.

Pursuant to Education Code 45130, districts are not required to pay overtime for any classified positions established by the Board, or by the personnel commission in a merit system district, as supervisory, administrative, or executive. In approving positions for exclusion from the overtime provisions, the Board or personnel commission must certify in writing that the duties, flexibility of

hours, salary, benefit structure, and authority of the positions are of such a nature that they should be set apart from those positions which are subject to the overtime provisions. See: [see](#) BP/AR 4300 - Administrative and Supervisory Personnel. However, Education Code 45130 requires that, if a classified employee in an exempt position is required to work on a holiday designated in law or by the Board, the employee must be paid the regular pay for that day plus compensation or compensatory time off at a rate not less than the employee's normal rate of pay.

Overtime pay requirements are also not applicable to school administrators or teachers in elementary or secondary schools under specific exemptions in 29 USC 213 and 29 CFR 541.303. Pursuant to 29 CFR 541.303 and 541.600, teachers do not need to meet the salary level requirement to be exempt from overtime rules. 29 CFR 541.204 provides that, to be exempt from overtime rules, administrators must either meet the salary level requirement or be compensated on a salary basis that is at least equal to the entrance salary for teachers in the administrator's school.

District employees shall be paid an overtime rate of not less than one and one-half times their regular rate of pay for any hours worked in excess of eight hours in one day [and](#)/or 40 hours in one work week, or twice their regular rate of pay for any hours worked in excess of 12 hours in one day or eight hours on the seventh consecutive day of work. However, teachers, school administrators, and other employees in positions established by the Board as executive, administrative, or professional shall be exempt from overtime rules. (Education Code 45128, 45130; 29 USC 213; 29 CFR 541.0-541.710, 553.27, 553.32)

CSBA NOTE: The following optional paragraph is for use by districts that allow employees to take compensatory time off in lieu of overtime compensation as authorized by 29 USC 207 and 29 CFR 553.20-553.25. Time off in lieu of overtime compensation is allowed only if provided for in a collective bargaining agreement or other agreement and must be provided at the rate of at least one and one-half hours for each hour of overtime work.

Pursuant to 29 CFR 553.21, an employee must be allowed to use earned compensatory time within a "reasonable period" after making the request. 29 CFR 553.25 provides that a "reasonable period" is determined on a case-by-case basis by considering customary work practices such as the normal work schedule, anticipated peak workloads based on past experience, emergency requirements for staff and services, and the availability of qualified substitute staff. Education Code 45129 provides that the compensatory time off must be used within 12 calendar months.

When authorized in a collective bargaining agreement or other agreement between the district and employees, an employee may take compensatory time off in lieu of overtime compensation, provided the employee has not accrued compensatory time in excess of the limits specified in 29 USC 207.

For each nonexempt employee, the Superintendent or designee shall maintain records on the employee's wages, hours, and other information specified in 29 CFR 516.5-516.6.

Wage Overpayment

CSBA NOTE: Education Code 44042.5, as added by AB 185 (Ch. 571, Statutes of 2022) and amended by SB 114 (Ch. 48, Statutes of 2023), requires districts to follow the process specified below when a

wage overpayment is made to a district employee. If the provisions of this section are in conflict with a collective bargaining agreement or a memorandum of understanding that was in effect on July 31, 2022, such agreements shall be controlling until the expiration or renewal of such agreements. The district should consult CSBA's District and County Office of Education Legal Services or district legal counsel when questions arise about legal requirements for specific wage overpayments.

If, following the determination of an overpayment, the employee disputes the overpayment, the district shall initiate legal action and obtain a court order or binding arbitration decision. Binding arbitration may only apply to such overpayment disputes if a memorandum of understanding between the district and exclusive representative sets forth procedures for adjudicating such wage overpayment disputes that meet the minimum requirements set forth in Education Code 44042.5.

If the district determines an employee has been overpaid, the district shall notify the employee in writing of the overpayment, afford the employee an opportunity to respond before commencing any recoupment actions, and inform the employee of the employee's rights to dispute the existence or amount of the claimed overpayment. If the employee agrees there was an overpayment in the claimed amount, reimbursement shall be made to the district through one of the methods described in Education Code 44042.5 as mutually agreed upon by the employee and the district. (Education Code 44042.5)

If a mutual agreement on a method of reimbursement is not reached, within 30 days of the employee verifying the overpayment amount, the district shall recoup the overpayment through payroll deductions in accordance with Education Code 44042.5.

If the employee does not respond or disputes the existence or amount of the district's claimed overpayment, the district shall, with board approval, initiate a legal action to recover the overpayment. (Education Code 44042.5)

If the employee separates from the district before the overpayment is fully repaid, the district shall withhold the remaining balance due from any money owed to the employee upon separation, provided that the state minimum wage is still paid to the employee as required by Education Code 44042.5. The Superintendent or designee may consult with legal counsel to calculate the amount to withhold.

If an outstanding overpayment balance still remains, the district shall, with Board approval, exercise any legal means to recover the remaining amount owed by the employee. (Education Code 44042.5)

Legal action to recover any overpayment under this policy shall be initiated within three years from the date of the overpayment, which for leave credits is the date that the employee receives compensation in exchange for leave erroneously credited to the employee. (Education Code 44042.5)

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Policy Reference Disclaimer:

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State

Description

8 CCR 11040	Wages and hours; definitions of administrative, executive, and professional employees
Ed. Code 44042.5	Wage overpayment
Ed. Code 45022-45061.5	Salaries
Ed. Code 45023	Availability of salary schedule
Ed. Code 45028	Salary schedule and exceptions
Ed. Code 45127-45133.5	Classified employees; work week; overtime provisions
Ed. Code 45160-45169	Salaries for classified employees
Ed. Code 45268	Salary schedule for classified service in merit system districts
Ed. Code 45500	Classified School Employee Summer Assistance Program
Gov. Code 3540-3549	Meeting and negotiating
Gov. Code 3543.2	Scope of representation
Gov. Code 3543.7	Duty to meet and negotiate in good faith
Lab. Code 226	Employee access to payroll records
Lab. Code 232	Disclosure of wages
Federal	Description
26 CFR 1.409A-1	Definitions and covered plans
26 USC 409A	Deferred compensation plans
29 CFR 516.4	Notice of minimum wage and overtime provisions
29 CFR 516.5-516.6	Records
29 CFR 541.0-541.710	Exemptions for executive, administrative, and professional employees
29 CFR 553.1-553.51	Fair Labor Standards Act; applicability to public agencies
29 USC 201-219	Fair Labor Standards Act
29 USC 203	Definitions
29 USC 207	Fair Labor Standards Act
29 USC 213	Exemptions from minimum wage and overtime requirements
Management Resources	Description
Court Decision	Flores v. City of San Gabriel, (9th Cir., June 2, 2016, No. 14-56421) 824 F.3d 890
Office of Management and Budget Publication	Administrative Relief for Recipients and Applicants of Fed. Fin. Assist. Federal Financial Assistance Directly Impacted by COVID-19 Due due to Loss of Operations , Memo M-20-17, March 19, 2020

Website	CSBA District and County Office of Education Legal Services
Website	U.S. Department of Labor, Wage and Hour Division
Website	Internal Revenue Service
Website	School Services of California, Inc.
Website	CSBA

Cross References

Code	Description
0470	COVID-19 Mitigation Plan
3100	Budget
3100	Budget
3400	Management Of District Assets/Accounts
3400	Management Of District Assets/Accounts
3580	District Records
3580	District Records
4000	Concepts And Roles
4030	Nondiscrimination In Employment
4030	Nondiscrimination In Employment
4112.6	Personnel Files
4113.5	Working Remotely
4121	Temporary/Substitute Personnel
4121	Temporary/Substitute Personnel
4140	Bargaining Units
4141	Collective Bargaining Agreement
4143	Negotiations/Consultation
4154	Health And Welfare Benefits
4154	Health And Welfare Benefits
4212	Appointment And Conditions Of Employment
4212.6	Personnel Files
4213.5	Working Remotely
4240	Bargaining Units

4241	Collective Bargaining Agreement
4243	Negotiations/Consultation
4254	Health And Welfare Benefits
4254	Health And Welfare Benefits
4312.1	Contracts
4312.6	Personnel Files
4313.5	Working Remotely
4340	Bargaining Units
4354	Health And Welfare Benefits
4354	Health And Welfare Benefits

Policy 4351: Employee Compensation

Status: ADOPTED

Original Adopted Date: 02/01/1997 | **Last Revised Date:** 05/09/01/20202023 | **Last Reviewed Date:** 05/09/01/20202023

CSBA NOTE: Districts that include provisions related to employee compensation in their collective bargaining agreements should modify or delete the following optional policy accordingly.

In order to recruit and retain employees committed to the district's goals for student learning, the Governing Board recognizes the importance of offering a competitive compensation package which includes salaries and health and welfare benefits.

CSBA NOTE: Education Code 45023 and 45162 require the Governing Board to adopt salary schedules for certificated and classified employees, respectively. For districts operating under a merit system, Education Code 45268 specifies that the personnel commission will recommend a salary schedule for classified employees to the Board for approval and that the Board may not amend the schedule without first giving the commission an opportunity to respond to the amendments.

The Board shall adopt separate salary schedules for certificated, classified, and supervisory and administrative personnel. These schedules shall comply with law and collective bargaining agreements and shall be printed and made available for review at the district office. (Education Code 45022, 45023, 45160, 45162, 45268)

Each certificated employee, except an employee in an administrative or supervisory position, shall be classified on the salary schedule on the basis of uniform allowance for education level and years of experience, unless the Board and employee organization negotiate and mutually agree to a salary schedule based on different criteria. Certificated employees shall not be placed in different classifications on the schedule, nor paid different salaries, solely on the basis of the grade levels at which they teach. (Education Code 45028)

Salary schedules for staff who are not a part of a bargaining unit shall be determined by the Board at the recommendation of the Superintendent or designee.

CSBA NOTE: Pursuant to Education Code 45038, certificated employees may be paid once every two weeks, twice a month, or once every four weeks. The Board may also choose to pay certificated employees, or one or more individual employees, in 10, 11, or 12 equal payments over the year. Education Code 45039 provides that, if the Board arranges to pay certificated employees in 12 equal payments for the year, it may pay each monthly installment at the end of each calendar month, regardless of whether ~~or not~~ the employees are engaged in teaching during the month. Education Code 45165 addresses salary payments for classified employees who are employed 9-11 months per year.

Additionally, pursuant to Education Code 45500, districts may participate in the Classified School Employee Summer Assistance Program whereby eligible classified employees may elect to have up to 10 percent of the employee's monthly salary withheld and paid out during the summer recess in

either one or two payments.

Education Code 45048 and 45165 provide specific timelines for issuing salary payments depending on the frequency of payments. If payments are not made in a timely manner, the district is required to pay the employee interest on the unpaid amount.

The following paragraph may be revised to reflect the payroll schedule determined by the Board.

The Board shall determine the frequency and schedule of salary payments, including whether payments for employees who work less than 12 months per year will be made over the course of the school year or in equal installments over the calendar year. (~~Education Code 45038, 45039, 45048, 45165~~ However, if the district participates in the Classified School Employee Summer Assistance Program, eligible classified employees may elect to have up to 10 percent of the employee's monthly salary withheld and paid out during the summer recess in either one or two payments. (Education Code 45038, 45039, 45048, 45165, 45500))

CSBA NOTE: According to Office of Management and Budget Memorandum M-20-17, during extraordinary circumstances, such as a pandemic, which ~~interrupts~~ interrupt district operations, employees paid with federal grant funds can continue to be paid out of federal grant funds as long as other similarly situated employees paid with nonfederal funds are continuing to get compensated. The following optional paragraph establishes such emergency contingencies so that the Board may continue to provide employee compensation during such times.

In extraordinary circumstances or emergency situations, the Board may determine to continue to compensate employees during periods of extended closure or disruption of normal district operations when permitted by law and consistent with collective bargaining agreements and memoranda of understanding.

CSBA NOTE: Pursuant to 29 CFR 516.4, districts are required to post a notice of the minimum wage provisions of the Fair Labor Standards Act (FLSA) (29 USC 201-219) in a conspicuous place at all work sites. The poster that must be used by state and local governments is available on the ~~web site~~ website of the U.S. Department of Labor's Wage and Hour Division.

The Superintendent or designee shall post a notice explaining the Fair Labor Standards Act's wage and hour provisions in a conspicuous place at each work site. (29 CFR 516.4)

Overtime Compensation

CSBA NOTE: Pursuant to the FLSA (29 CFR 553.20) and Education Code 45128, employees who are not specifically exempted by law, including classified employees in both merit and non-merit system districts, must receive overtime pay or compensatory time off at a rate not less than one and one-half times their regular rate of pay for hours worked in excess of eight hours in any one day and ~~/or~~ in excess of 40 hours per calendar week. However, if the Board has established a work day of less than eight hours but at least seven hours, and a work week of less than 40 hours but at least 35 hours, all time worked in excess of the established work schedule must be deemed overtime.

Pursuant to Education Code 45130, districts are not required to pay overtime for any classified positions established by the Board, or by the personnel commission in a merit system district, as supervisory, administrative, or executive. In approving positions for exclusion from the overtime provisions, the Board or personnel commission must certify in writing that the duties, flexibility of

hours, salary, benefit structure, and authority of the positions are of such a nature that they should be set apart from those positions which are subject to the overtime provisions. See: [see](#) BP/AR 4300 - Administrative and Supervisory Personnel. However, Education Code 45130 requires that, if a classified employee in an exempt position is required to work on a holiday designated in law or by the Board, the employee must be paid the regular pay for that day plus compensation or compensatory time off at a rate not less than the employee's normal rate of pay.

Overtime pay requirements are also not applicable to school administrators or teachers in elementary or secondary schools under specific exemptions in 29 USC 213 and 29 CFR 541.303. Pursuant to 29 CFR 541.303 and 541.600, teachers do not need to meet the salary level requirement to be exempt from overtime rules. 29 CFR 541.204 provides that, to be exempt from overtime rules, administrators must either meet the salary level requirement or be compensated on a salary basis that is at least equal to the entrance salary for teachers in the administrator's school.

District employees shall be paid an overtime rate of not less than one and one-half times their regular rate of pay for any hours worked in excess of eight hours in one day [and](#)/or 40 hours in one work week, or twice their regular rate of pay for any hours worked in excess of 12 hours in one day or eight hours on the seventh consecutive day of work. However, teachers, school administrators, and other employees in positions established by the Board as executive, administrative, or professional shall be exempt from overtime rules. (Education Code 45128, 45130; 29 USC 213; 29 CFR 541.0-541.710, 553.27, 553.32)

CSBA NOTE: The following optional paragraph is for use by districts that allow employees to take compensatory time off in lieu of overtime compensation as authorized by 29 USC 207 and 29 CFR 553.20-553.25. Time off in lieu of overtime compensation is allowed only if provided for in a collective bargaining agreement or other agreement and must be provided at the rate of at least one and one-half hours for each hour of overtime work.

Pursuant to 29 CFR 553.21, an employee must be allowed to use earned compensatory time within a "reasonable period" after making the request. 29 CFR 553.25 provides that a "reasonable period" is determined on a case-by-case basis by considering customary work practices such as the normal work schedule, anticipated peak workloads based on past experience, emergency requirements for staff and services, and the availability of qualified substitute staff. Education Code 45129 provides that the compensatory time off must be used within 12 calendar months.

When authorized in a collective bargaining agreement or other agreement between the district and employees, an employee may take compensatory time off in lieu of overtime compensation, provided the employee has not accrued compensatory time in excess of the limits specified in 29 USC 207.

For each nonexempt employee, the Superintendent or designee shall maintain records on the employee's wages, hours, and other information specified in 29 CFR 516.5-516.6.

Wage Overpayment

CSBA NOTE: Education Code 44042.5, as added by AB 185 (Ch. 571, Statutes of 2022) and amended by SB 114 (Ch. 48, Statutes of 2023), requires districts to follow the process specified below when a

wage overpayment is made to a district employee. If the provisions of this section are in conflict with a collective bargaining agreement or a memorandum of understanding that was in effect on July 31, 2022, such agreements shall be controlling until the expiration or renewal of such agreements. The district should consult CSBA's District and County Office of Education Legal Services or district legal counsel when questions arise about legal requirements for specific wage overpayments.

If, following the determination of an overpayment, the employee disputes the overpayment, the district shall initiate legal action and obtain a court order or binding arbitration decision. Binding arbitration may only apply to such overpayment disputes if a memorandum of understanding between the district and exclusive representative sets forth procedures for adjudicating such wage overpayment disputes that meet the minimum requirements set forth in Education Code 44042.5.

If the district determines an employee has been overpaid, the district shall notify the employee in writing of the overpayment, afford the employee an opportunity to respond before commencing any recoupment actions, and inform the employee of the employee's rights to dispute the existence or amount of the claimed overpayment. If the employee agrees there was an overpayment in the claimed amount, reimbursement shall be made to the district through one of the methods described in Education Code 44042.5 as mutually agreed upon by the employee and the district. (Education Code 44042.5)

If a mutual agreement on a method of reimbursement is not reached, within 30 days of the employee verifying the overpayment amount, the district shall recoup the overpayment through payroll deductions in accordance with Education Code 44042.5.

If the employee does not respond or disputes the existence or amount of the district's claimed overpayment, the district shall, with board approval, initiate a legal action to recover the overpayment. (Education Code 44042.5)

If the employee separates from the district before the overpayment is fully repaid, the district shall withhold the remaining balance due from any money owed to the employee upon separation, provided that the state minimum wage is still paid to the employee as required by Education Code 44042.5. The Superintendent or designee may consult with legal counsel to calculate the amount to withhold.

If an outstanding overpayment balance still remains, the district shall, with Board approval, exercise any legal means to recover the remaining amount owed by the employee. (Education Code 44042.5)

Legal action to recover any overpayment under this policy shall be initiated within three years from the date of the overpayment, which for leave credits is the date that the employee receives compensation in exchange for leave erroneously credited to the employee. (Education Code 44042.5)

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State

Description

8 CCR 11040	Wages and hours; definitions of administrative, executive, and professional employees
Ed. Code 44042.5	Wage overpayment
Ed. Code 45022-45061.5	Salaries
Ed. Code 45023	Availability of salary schedule
Ed. Code 45028	Salary schedule and exceptions
Ed. Code 45127-45133.5	Classified employees; work week; overtime provisions
Ed. Code 45160-45169	Salaries for classified employees
Ed. Code 45268	Salary schedule for classified service in merit system districts
Ed. Code 45500	Classified School Employee Summer Assistance Program
Gov. Code 3540-3549	Meeting and negotiating
Gov. Code 3543.2	Scope of representation
Gov. Code 3543.7	Duty to meet and negotiate in good faith
Lab. Code 226	Employee access to payroll records
Lab. Code 232	Disclosure of wages
Federal	Description
26 CFR 1.409A-1	Definitions and covered plans
26 USC 409A	Deferred compensation plans
29 CFR 516.4	Notice of minimum wage and overtime provisions
29 CFR 516.5-516.6	Records
29 CFR 541.0-541.710	Exemptions for executive, administrative, and professional employees
29 CFR 553.1-553.51	Fair Labor Standards Act; applicability to public agencies
29 USC 201-219	Fair Labor Standards Act
29 USC 203	Definitions
29 USC 207	Fair Labor Standards Act
29 USC 213	Exemptions from minimum wage and overtime requirements
Management Resources	Description
Court Decision	Flores v. City of San Gabriel, (9th Cir., June 2, 2016, No. 14-56421) 824 F.3d 890
Office of Management and Budget Publication	Administrative Relief for Recipients and Applicants of Fed. Fin. Assist. Federal Financial Assistance Directly Impacted by COVID-19 Due due to Loss of Operations , Memo M-20-17, March 19, 2020

Website	CSBA District and County Office of Education Legal Services
Website	U.S. Department of Labor, Wage and Hour Division
Website	Internal Revenue Service
Website	School Services of California, Inc.
Website	CSBA

Cross References

Code	Description
0470	COVID-19 Mitigation Plan
3100	Budget
3100	Budget
3400	Management Of District Assets/Accounts
3400	Management Of District Assets/Accounts
3580	District Records
3580	District Records
4000	Concepts And Roles
4030	Nondiscrimination In Employment
4030	Nondiscrimination In Employment
4112.6	Personnel Files
4113.5	Working Remotely
4121	Temporary/Substitute Personnel
4121	Temporary/Substitute Personnel
4140	Bargaining Units
4141	Collective Bargaining Agreement
4143	Negotiations/Consultation
4154	Health And Welfare Benefits
4154	Health And Welfare Benefits
4212	Appointment And Conditions Of Employment
4212.6	Personnel Files
4213.5	Working Remotely
4240	Bargaining Units

4241	Collective Bargaining Agreement
4243	Negotiations/Consultation
4254	Health And Welfare Benefits
4254	Health And Welfare Benefits
4312.1	Contracts
4312.6	Personnel Files
4313.5	Working Remotely
4340	Bargaining Units
4354	Health And Welfare Benefits
4354	Health And Welfare Benefits

Policy 5131.9: Academic Honesty

Status: ADOPTED

Original Adopted Date: 06/01/1987 | **Last Revised Date:** 07/09/01/20002023 | **Last Reviewed Date:** 07/09/01/20002023

CSBA NOTE: The Following policy is optional and may be revised to reflect district practice.

The Governing Board believes that academic honesty and personal integrity are fundamental components of a student's education and character development. The Board expects that students will not cheat, lie, plagiarize, or commit other acts of academic dishonesty.

Students, parents/guardians, staff, and administrators shall be responsible for creating and maintaining a positive school climate that encourages honesty. Students found to have committed an act of academic dishonesty shall be subject to district and school-site discipline rules.

The Superintendent or designee may establish a committee comprised of students, parents/guardians, staff, administrators, and members of the public to develop standards of academic honesty, measures of preventing dishonesty, and specific consequences for acts of dishonesty. Any recommendations for discipline shall be incorporated into the school's site level discipline rules.

Prohibited and Permitted Technology Use

CSBA NOTE: The following section addresses student use of technology, such as artificial intelligence (AI), as it relates to academic honesty, and may be modified to reflect district practice. The U.S. Department of Education Office of Educational Technology's, "Artificial Intelligence and the Future of Teaching and Learning: Insights and Recommendations," provides information related to the opportunities for using AI to improve education, the challenges in doing so, and recommendations to guide further policy development. Districts are encouraged to continue to monitor the development of new technologies, including AI, and, as needed, consult with CSBA's District and County Office of Education Legal Services or district legal counsel. For more information on student use of technology, see BP 6163.4 - Student Use of Technology.

As the district's standards for academic achievement are designed to challenge all students to reach their full potential in acquiring the knowledge and skills needed for success in postsecondary education, employment, and responsible citizenship, any use of technology that prevents or inhibits a student from achieving these standards is prohibited. Prohibited uses include, but are not limited to, using technology primarily or solely for the completion of coursework as a student's original work and generating answers to mathematical, scientific, or analytical problems.

Permitted uses of technology include, but are not limited to, conducting research, correcting grammar and spelling, and learning from educational applications such as tutoring systems and language learning applications.

Additionally, consistent with the limitations expressed in this policy and with teacher consent, students may also use technology to assist with assessments, homework, and/or makeup work or other uses approved by the teacher.

CSBA NOTE: A student who has been identified as a student with a disability may require assistive technology devices and services, including the use of AI. Pursuant to Education Code 56341.1, a student's Individualized Education Program team must consider whether a student with a disability needs assistive technology devices or services, defined in 20 USC 1401 as any item, piece of equipment, or product system that is used to increase, maintain, or improve functional capabilities of a student with a disability. For more information regarding assistive technology for a student with a disability, see AR 6159 – Individualized Education Program.

However, a student with a disability shall be permitted to use technology for any purpose identified in the student's individualized education program as a tool to support the student's learning. If an employee suspects that a student has used technology in violation of this policy, the student shall be given the opportunity to demonstrate that the use of technology was in accordance with this policy.

Any information acquired from an employee's use of technology in determining whether a student has committed an act of academic dishonesty shall be shared with the student, and the student's parent/guardian as appropriate.

The Superintendent or designee may provide training to staff regarding the use of technology to improve education, including the detection of plagiarism and sensitivity to potential discrimination from algorithmic bias.

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State

Ed. Code 35291-35291.5

[Ed. Code 56341.1](#)

Federal

[20 USC 1401](#)

Management Resources

Website

[Website](#)

[U.S. Department of Education, Office of Educational Technology Publication](#)

[Metropolitan Educational Research Consortium Publication](#)

Description

Rules

[Assistive technology devices for a student with a disability](#)

Description

[Assistive technology device; definition](#)

Description

CSBA District and County Office of Education Legal Services

[Metropolitan Educational Research Consortium \(https://merc.soe.vcu.edu/\)](#)

[Artificial Intelligence and the Future of Teaching and Learning: Insights and Recommendations, May 2023 \(https://www2.ed.gov/documents/ai-report/ai-report.pdf\)](#)

[Balancing the Benefits and Risks of AI Large Language Models in K12 Public Schools, 2023 \(https://scholarscompass.vcu.edu/cgi/viewcontent.cgi?article=1133&context=merc_pubs\)](#)

Cross References

Code	Description
5131	Conduct
5131.8	Mobile Communication Devices
5137	Positive School Climate
5144	Discipline
5144	Discipline
<u>6000</u>	<u>Concepts And Roles</u>
<u>6141</u>	<u>Curriculum Development and Evaluation</u>
<u>6159</u>	<u>Individualized Education Program</u>
6162.54	Test Integrity/Test Preparation
6162.6	Use Of Copyrighted Materials
6162.6	Use Of Copyrighted Materials
<u>6163.4</u>	<u>Student Use of Technology</u>

Policy 6154: Homework/Makeup Work

Status: ADOPTED

Original Adopted Date: 02/01/1997 | **Last Revised Date:** ~~12/09/01/2019~~2023 | **Last Reviewed Date:** ~~12/09/01/2019~~2023

CSBA NOTE: The following optional policy may be revised to reflect district practice.

The Governing Board recognizes that meaningful homework assignments can be a valuable extension of student learning time, provide enrichment, and assist students in developing good study habits. Homework and/or makeup work shall be assigned when necessary to support classroom lessons, enable students to complete unfinished assignments, or review and apply academic content for better understanding.

CSBA NOTE: The following paragraph addresses student use of technology, including artificial intelligence (AI), in relation to homework and makeup work, and may be modified to reflect district practice. The U.S. Department of Education Office of Educational Technology's, "Artificial Intelligence and the Future of Teaching and Learning: Insights and Recommendations," provides information related to the opportunities for using AI to improve education, the challenges in doing so, and recommendations to guide further policy development. For more information regarding prohibited and permitted student use of technology, see BP 5131.9 – Academic Honesty and BP 6163.4 – Student Use of Technology.

Students may use technology to assist with homework and/or makeup work in conducting research, correcting grammar and spelling, and learning from educational applications such as tutoring systems and language learning applications, as specified in Board Policy 5131.9 – Academic Honesty and Board Policy 6163.4 – Student Use of Technology.

The Superintendent or designee shall collaborate with school administrators and teachers to develop and regularly review guidelines for the assignment of homework and the related responsibilities of students, staff, and parents/guardians.

CSBA NOTE: The following optional paragraph may be revised to specify the average number of minutes of homework that may be expected per day at each grade level, or the district may adopt an administrative regulation that contains such guidelines.

Homework assignments shall be reasonable in length and appropriate to the grade level and course. The Board expects that the number, frequency, and degree of difficulty of homework assignments will increase with the grade level and the maturity of students. Teachers shall assign homework only as necessary to fulfill academic goals and reinforce current instruction.

As needed, teachers may receive training in designing relevant homework assignments that reinforce classroom learning objectives and inspire students' interests.

CSBA NOTE: The following optional paragraph may be revised to reflect district practice.

Although on-time completion of homework is important to maintain academic progress, the Board recognizes that students learn at different rates. Students may receive credit for work that is

completed late in order to encourage their continued learning at the discretion of the teacher.

Age-appropriate instruction may be given to help students allocate their time wisely, meet their deadlines, learn to work independently, and develop good personal study habits.

At the beginning of the school year, teachers shall communicate homework expectations to students and their parents/guardians. Homework guidelines shall also be included in student and/or parent/guardian handbooks. These communications shall include the manner in which homework relates to achievement of academic standards and course content, the impact of homework assignments on students' grades, any school resources and programs that are available to provide homework support, and ways in which parents/guardians may appropriately assist their children.

Although it is the student's responsibility to undertake assignments independently, parents/guardians may serve as a resource and are encouraged to ensure that their child's homework assignments are completed. ~~When a student repeatedly fails to complete homework, the teacher shall notify the student's parents/guardians as soon as possible so that corrective action can be taken prior to the release of any final grades or report cards.~~ Students may also work with other students and use approved outside resources as directed by the teacher.

CSBA NOTE: The following paragraph should be revised to reflect district practice. Pursuant to Education Code 8482.3, ~~before-school and after-school~~ programs operated under the After School Education and Safety Program (Education Code 8482-8484.65) ~~and/or~~, the federal 21st Century Community Learning Center program (Education Code 8484.7-8484.9; 20 USC 7171-7176), and/or the Expanded Learning Opportunities Program (Education Code 46120) are required to include an educational and literacy component in which tutoring or homework assistance is provided in language arts, mathematics, history-social science, computer training, and/or science. If the district offers a before-school or after-school program under the 21st Century High School After School Safety and Enrichment for Teens program for grades 9-12 (Education Code 8420-8428; 20 USC 7171-7176), the program must include an academic assistance program, which may include homework assistance. See AR 5148.2 - Before/After School Programs. In addition, some districts offer a supervised study hall elective which high school students can take instead of other electives.

To further support students' homework efforts, the Superintendent or designee may establish and maintain electronic forums, provide access to school library media centers and technological resources, and/or provide before-school and after-school programs where students can receive homework assistance from teachers, volunteers, and/or student tutors. The Board encourages the Superintendent or designee to design class and transportation schedules that will enable students to make use of homework support services.

Teachers shall review all completed homework to assess the student's understanding of academic content and shall provide timely feedback to the student.

Makeup Work

CSBA NOTE: Pursuant to Education Code 48205, students who miss ~~school work~~ schoolwork because of an excused absence must be given full credit for makeup work satisfactorily completed within a reasonable period of time. State law does not require districts to give full credit for makeup work following an unexcused absence. However, CSBA's governance brief, “Research-Supported Strategies to Improve the Accuracy and Fairness of Grades,” recommends that student absence be dealt with separately from determining students' academic understanding and progress. Thus, the following paragraph provides for full credit to be awarded for satisfactory completion of makeup work regardless of the reason for the absence, an approach which is consistent with BP/AR 5121 - Grades/Evaluation for Student Achievement. Also see BP/AR 5113.1 - Chronic Absence and Truancy for strategies to address excessive excused and/or unexcused absences. The district may revise the following paragraph to reflect district practice, provided that it ensures compliance with Education Code 48205.

Students who are absent from school for excused reasons shall be given the opportunity to complete all assignments and tests that can be reasonably provided. As determined by the teacher, the assignments and tests shall be equivalent to, but not necessarily identical to, the assignments and tests missed during the absence. Students shall receive full credit for work satisfactorily completed within a reasonable period of time.

The Superintendent or designee shall notify parents/guardians that no student may have a grade reduced or lose academic credit for any excused absence when missed assignments and tests are satisfactorily completed within a reasonable period of time. Such notification shall include the full text of Education Code 48205. (Education Code 48980)

Suspended Students

CSBA NOTE: Education Code 48913.5, as added by AB 982 (Ch. 779, Statutes of 2019), requires that when a parent/guardian of a student who has been suspended for two or more school days requests homework that the student would otherwise have been assigned, the student's teacher shall provide such homework.

When a parent/guardian of a student who has been suspended for two or more school days requests homework that the student would otherwise have been assigned, the student's teacher shall provide such homework. If a homework assignment is requested and is turned in to the teacher by the student either upon the student's return from suspension or within the timeframe originally prescribed by the teacher, whichever is later, and is not graded before the end of the academic term, the homework assignment shall not be included in the calculation of the student's overall grade in the class. (Education Code 48913.5)

The teacher of any class from which a student is suspended may require the student to complete any assignments and tests missed during the suspension. (Education Code 48913)

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State

[Ed. Code 46120](#)

Ed. Code 48205

Ed. Code 48913

Ed. Code 48913.5

Ed. Code 48980

[Ed. Code 56341.1](#)

Ed. Code 8420-8428

Ed. Code 8482-8484.65

Ed. Code 8484.7-8484.9

Federal

[20 USC 1401](#)

20 USC 7171-7176

Description

[Expanded Learning Opportunities Program](#)

Absence from school for jury duty or precinct board service

Completion of work missed by suspended student

Suspended students; homework assignments

Parent/Guardian notifications

[Assistive technology devices for a student with a disability](#)

21st Century High School After School Safety and Enrichment for Teens

After School Education and Safety Program

21st Century Community Learning Centers

Description

[Assistive technology device; definition](#)

21st Century Community Learning Centers

Management Resources

CSBA Publication

Description

Research-Supported Strategies to Improve the Accuracy and Fairness of Grades, Governance Brief, July 2016

<https://www.csba.org/->

[/media/CSBA/Files/GovernanceResources/GovernanceBriefs/20161507-](#)

[GradingGB.ashx?la=en&rev=4e25a7ce86c742198068af40c27324b5\)](#)

[U.S. Department of Education, Office of Educational Technology Publication](#)

[Artificial Intelligence and the Future of Teaching and Learning: Insights and Recommendations, May 2023](#)

<https://www2.ed.gov/documents/ai-report/ai-report.pdf>

Website

CSBA District and County Office of Education Legal Services

Website

California State Parent Teacher Association

Website

CSBA

[Website](#)

[Metropolitan Educational Research Consortium](#)

<https://merc.soe.vcu.edu/>

Cross References**Code**

0470

Description

COVID-19 Mitigation Plan

1240

Volunteer Assistance

1240

Volunteer Assistance

1700	Relations Between Private Industry And The Schools
3541	Transportation Routes And Services
4131	Staff Development
5020	Parent Rights And Responsibilities
5020	Parent Rights And Responsibilities
5113	Absences And Excuses
5113	Absences And Excuses
5121	Grades/Evaluation Of Student Achievement
5121	Grades/Evaluation Of Student Achievement
<u>5131.9</u>	<u>Academic Honesty</u>
5144.1	Suspension And Expulsion/Due Process
5144.1	Suspension And Expulsion/Due Process
5145.6	Parent/Guardian Notifications
5145.6-E(1)	Parent/Guardian Notifications
5148	Child Care And Development
5148	Child Care And Development
5148.2	Before/After School Programs
5148.2	Before/After School Programs
6011	Academic Standards
6020	Parent Involvement
6020	Parent Involvement
6112	School Day
6112	School Day
6141.2	Recognition Of Religious Beliefs And Customs
6141.2	Recognition Of Religious Beliefs And Customs
6142.4	Service Learning/Community Service Classes
<u>6159</u>	<u>Individualized Education Program</u>
6163.1	Library Media Centers
<u>6163.4</u>	<u>Student Use of Technology</u>
6176	Weekend/Saturday Classes
6177	Summer Learning Programs

Policy 6162.5: Student Assessment

Status: ADOPTED

Original Adopted Date: 07/01/2010 | **Last Revised Date:** 03/09/01/2018 ~~2023~~ | **Last Reviewed Date:** 03/09/01/2018 ~~2023~~

CSBA NOTE: The following optional policy may be revised to reflect district practice. For information about required state assessments administered as part of the California Assessment of Student Performance and Progress (CAASPP), see BP/AR 6162.51 - State Academic Achievement Tests.

The Governing Board recognizes that student assessments are an important instructional and accountability tool. To obtain the most accurate evaluation of student performance, the district shall use a variety of measures, including district, state, and/or national assessments.

[NEW CSBA NOTE: The following paragraph reflects that prohibited and permitted student use of technology, including artificial intelligence (AI), in relation to assessments, should be as specified in BP 5131.9 – Academic Honesty and BP 6163.4 – Student Use of Technology, and may be modified to reflect district practice. The U.S. Department of Education Office of Educational Technology’s, “Artificial Intelligence and the Future of Teaching and Learning: Insights and Recommendations,” provides information related to the opportunities for using AI to improve education, the challenges in doing so, and recommendations to guide further policy development.]

Any student use of technology to complete assessments shall be as specified in Board Policy 5131.9 – Academic Honesty and Board Policy 6163.4 – Student Use of Technology.

CSBA NOTE: The following paragraph addresses potential uses of student assessment data. Pursuant to Education Code 52060, applicable statewide student assessments must be used as one of the measures of progress toward the district's annual goals for student achievement included in its local control and accountability plan; see AR 0460 - Local Control and Accountability Plan. In addition, pursuant to Education Code 44662, evaluations of certificated staff must include an assessment of students' progress toward meeting district standards of expected student achievement at each grade level in each area of study and, if applicable, toward state standards as measured by state criterion-referenced assessments (i.e., assessments that test students' mastery of the content). However, Education Code 44662 prohibits the use of publishers' norms established by standardized tests (i.e., assessments that compare students' performance to a representative sample of students) for the purpose of evaluating and assessing certificated staff performance. The use of student assessment results in staff evaluations may also be addressed in collective bargaining agreements or employment contracts. See BP/AR 4115 - Evaluation/Supervision and BP 4315 - Evaluation/Supervision.

Assessment data shall be used to help determine individual students' progress, mastery of academic standards, appropriate placement in district programs, and/or eligibility for graduation. In addition, summary data on student assessment results shall be used by the district to identify and review student achievement goals in the district's local control and accountability plan, evaluate district educational programs in order to identify needed improvements, and, as appropriate, evaluate staff performance.

In selecting or developing any district assessment, the Superintendent or designee shall examine evidence of its reliability, its validity for the intended purpose and for various student populations, and the extent to which it aligns with the material that is being taught.

The Superintendent or designee shall ensure that assessments are administered in accordance with law and test publisher's directions, and that test administration procedures are fair and equitable for all students.

CSBA NOTE: Education Code 52052 requires that schools and districts demonstrate comparable improvement in academic achievement by all "numerically significant" student subgroups, including, as amended by AB 114 (Ch. 48, Statutes of 2023), ethnic subgroups, socioeconomically disadvantaged students, English learners, long term English learners, students with disabilities, foster youth, and ~~homeless~~ students experiencing homelessness. A "numerically significant" subgroup is one that consists of at least 30 students, or 15 foster youth ~~or homeless~~ students experiencing homelessness, or long-term English learners, each of whom has a valid test score. To evaluate the extent to which the district fulfills this responsibility, it will be important to examine disaggregated student assessment results as provided below.

Pursuant to Education Code 49558, the Governing Board may adopt policy allowing the use of individual applications or records from the free and reduced-price meal program to identify students for the purpose of disaggregating student achievement data. See BP/AR 3553 - Free and Reduced Price Meals for optional language providing such authorization.

As appropriate, assessment results shall be disaggregated by student subgroup, classroom, grade level, and/or school site to allow for critical analysis of student needs.

The Superintendent or designee shall provide professional development as needed to assist administrators and teachers in interpreting and using assessment data to improve student performance and the instructional program.

When districtwide and school-level results of student assessments are published by the state, the Superintendent or designee may provide supplementary information to assist parents/guardians and the community in understanding test results.

Interim and Formative Assessments

CSBA NOTE: At their discretion, districts may choose to use the Smarter Balanced interim and formative assessments, which are part of the CAASPP. Pursuant to Education Code 60642.6, as amended by AB 1035 (Ch. 752, Statutes of 2017), these tests may be used, in combination with other sources of information, to gain timely feedback about student progress in an effort to continually adjust instruction to improve learning. Education Code 60642.7; as added by AB 1035, specifies that results of such assessments shall not be used for any high-stakes purpose.

State interim and formative assessments may be used in combination with other sources of information to gain timely feedback about student progress in an effort to continually adjust instruction to improve learning-, and for communicating with students' parents/guardians and identifying professional development goals. Results from interim and formative assessments shall not be used for any high-stakes purpose, including, but not limited to, teacher or other school staff evaluation, accountability, student grade promotion or retention, graduation, course or class placement, identification for gifted or talented education, reclassification of English learners, or

identification as an individual with exceptional needs. (Education Code 60642.6, 60642.7)

The Superintendent or designee shall ensure that teachers who administer interim and formative assessments have access to all functions and information designed for teacher use related to such assessments and student performance on the assessments. (Education Code 60642.6)

Individual Record of Accomplishment

CSBA NOTE: The following section is for use by districts that maintain high schools.

The Superintendent or designee shall ensure that each student, by the end of grade 12, has an individual record of accomplishment that includes the following: (Education Code 60607)

1. The results of the state achievement tests required and administered as part of the California Assessment of Student Performance and Progress, or any predecessor assessments, pursuant to Education Code 60640-60649
2. The results of any end-of-course examinations taken
3. The results of any vocational education certification examinations taken

No individual record of accomplishment shall be released to any person, other than the student's parent/guardian or a teacher, counselor, or administrator directly involved with the student, without the written consent of the student's parent/guardian, or the student if ~~he/she~~the student is an adult or emancipated minor. The student or ~~his/her~~the student's parent/guardian may authorize the release of the record of accomplishment to a postsecondary educational institution for the purposes of credit, placement, or admission. Furthermore, the results of an individual student on the CAASPP may be released to a postsecondary educational institution for the purpose of credit, placement, or admission. (Education Code 60607)

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State	Description
5 CCR 850- 864 <u>876</u>	California Assessment of Student Performance and Progress
Ed. Code 10600-10610	California Education Information System
Ed. Code 313	Assessment of English language development
Ed. Code 44660-44665	Evaluation and assessment of performance of certificated employees

Ed. Code 49558	Free and reduced-price meals; use of individual applications and records
Ed. Code 51041	Evaluation of the educational program
Ed. Code 51450-51455	Golden State Seal Merit Diploma
Ed. Code 52052	Accountability; numerically significant student subgroups
Ed. Code 52060-52077	Local control and accountability plan
Ed. Code 56341.1	Assistive technology devices for a student with a disability
Ed. Code 60600- 60648.5 60649	Assessment of academic achievement
Ed. Code 60640- 60648.5 60649	California Assessment of Student Performance and Progress
Ed. Code 60800	Physical performance test
Ed. Code 60900	California Longitudinal Pupil Achievement Data System
Ed. Code 60910	California State Preschool Program Longitudinal Pupil Achievement Data System

Federal

17 USC 102

[20 USC 1401](#)

20 USC 9622

Management Resources

[U.S. Department of Education, Office of Educational Technology Publication](#)

Website

Website

Website

Website

Website

[Website](#)

Description

Definitions

[Assistive technology device; definition](#)

National Assessment of Educational Progress

Description

[Artificial Intelligence and the Future of Teaching and Learning: Insights and Recommendations, May 2023](#)
(<https://www2.ed.gov/documents/ai-report/ai-report.pdf>)

CSBA District and County Office of Education Legal Services

Smarter Balanced Assessment Consortium

California Department of Education, Testing and Accountability

CSBA

U.S. Department of Education

[Metropolitan Educational Research Consortium](#)
<https://merc.soe.vcu.edu/>

Cross References

Code

0410

0415

Description

Nondiscrimination In District Programs And Activities

Equity

0420	School Plans/Site Councils
0420	School Plans/Site Councils
0460	Local Control And Accountability Plan
0460	Local Control And Accountability Plan
0500	Accountability
0510	School Accountability Report Card
1340	Access To District Records
1340	Access To District Records
2140	Evaluation Of The Superintendent
4115	Evaluation/Supervision
4115	Evaluation/Supervision
4131	Staff Development
4315	Evaluation/Supervision
4331	Staff Development
5121	Grades/Evaluation Of Student Achievement
5121	Grades/Evaluation Of Student Achievement
5123	Promotion/Acceleration/Retention
5123	Promotion/Acceleration/Retention
5125	Student Records
5125	Student Records
<u>5131.9</u>	<u>Academic Honesty</u>
6000	Concepts And Roles
6011	Academic Standards
6020	Parent Involvement
6020	Parent Involvement
6120	Response To Instruction And Intervention
6141	Curriculum Development And Evaluation
6141	Curriculum Development And Evaluation
6142.6	Visual And Performing Arts Education
6142.7	Physical Education And Activity
6142.7	Physical Education And Activity

6142.91	Reading/Language Arts Instruction
6142.92	Mathematics Instruction
6146.1	High School Graduation Requirements
6146.3	Reciprocity Of Academic Credit
6146.3	Reciprocity Of Academic Credit
6146.5	Elementary/Middle School Graduation Requirements
6151	Class Size
6152	Class Assignment
6152.1	Placement In Mathematics Courses
6152.1	Placement In Mathematics Courses
6155	Challenging Courses By Examination
6155	Challenging Courses By Examination
6158	Independent Study
6158	Independent Study
<u>6159</u>	<u>Individualized Education Program</u>
6161.1	Selection And Evaluation Of Instructional Materials
6161.1	Selection And Evaluation Of Instructional Materials
6161.1-E(1)	Selection And Evaluation Of Instructional Materials
6162.51	State Academic Achievement Tests
6162.51	State Academic Achievement Tests
6162.54	Test Integrity/Test Preparation
<u>6163.4</u>	<u>Student Use of Technology</u>
6164.4	Identification And Evaluation Of Individuals For Special Education
6164.4	Identification And Evaluation Of Individuals For Special Education
6164.5	Student Success Teams
6164.5	Student Success Teams
6170.1	Transitional Kindergarten
6171	Title I Programs
6171	Title I Programs

6172	Gifted And Talented Student Program
6172	Gifted And Talented Student Program
6172.1	Concurrent Enrollment In College Classes
6172.1	Concurrent Enrollment In College Classes
6173.4	Title VI Indian Education Program
6174	Education For English Learners
6174	Education For English Learners
6178	Career Technical Education
6178	Career Technical Education
6178.2	Regional Occupational Center/Program
6181	Alternative Schools/Programs Of Choice
6181	Alternative Schools/Programs Of Choice
6184	Continuation Education
6184	Continuation Education
6190	Evaluation Of The Instructional Program
9000	Role Of The Board
9321	Closed Session
9321-E(1)	Closed Session
9321-E(2)	Closed Session

Regulation 7140: Architectural And Engineering Services

Status: ADOPTED

Original Adopted Date: 02/01/1996 | **Last Revised Date:** ~~10/09/01/2019~~2023 | **Last Reviewed Date:** ~~10/09/01/2019~~2023

CSBA NOTE: When applying for state facilities funding, the district will be required to certify that any professional design services used for the project were selected using a qualification-based selection process. The Office of Public School Construction, in its [Construction's, "School Facility Program Handbook,"](#) advises districts to consult with legal counsel to ensure that its process for selecting architects or structural engineers is a qualification-based selection process and complies with all other legal requirements, including the Public Contract Code and requirements for disabled veterans business enterprises.

Contractors for any [private](#) architectural, landscape architectural, engineering, environmental, land surveying or construction project management services shall be selected, at fair and reasonable prices, on the basis of demonstrated competence and professional qualifications necessary for the satisfactory performance of the services required. (Government Code 4526)

CSBA NOTE: Government Code 4526 requires that the district's selection process include at least ~~items~~[Items](#) #1-3 below; however, the law does not prescribe the exact procedures that must be followed. Generally, elements of a "competitive process" include advertising and notice of the need for services, objective evaluation and selection criteria, and an appeals process for use by those not selected. Districts may wish to develop procedures consistent with these and other requirements in consultation with [CSBA's District and County Office of Education Legal Services or district](#) legal counsel.

The Superintendent or designee shall ensure that the selection process for projects receiving state funding: (Government Code 4526)

1. Assures maximum participation by small business firms as defined pursuant to Government Code 14837
2. Prohibits practices which might result in unlawful activity such as rebates, kickbacks, or other unlawful consideration
3. Prohibits district employees from participating in the selection process when they have a relationship with a person or business entity seeking a contract which would subject the employee to the prohibition of Government Code 87100

CSBA NOTE: Pursuant to Government Code 4527, the following items are optional and may be revised to reflect district practice.

The selection process may also include: (Government Code 4527)

1. Evaluation of current statements of qualifications and performance data on file with the district and evaluation of statements that may be submitted by other firms regarding the proposed project

2. Discussion with at least three firms regarding anticipated concepts and the relative utility of alternative approaches for furnishing the required services
3. Selection, in order of preference, of at least three firms deemed to be the most highly qualified to provide the required services in accordance with established district criteria

CSBA NOTE: The following paragraph is optional and may be revised to reflect district practice. Government Code 4528 authorizes, but does not require, the district to implement the following procedures.

The district shall negotiate a contract with the best qualified firm at compensation determined by the district to be fair and reasonable. If the district is unable to negotiate a contract with the most qualified firm, the district shall negotiate a contract with the second most qualified firm and, if unsuccessful, with the third most qualified firm. If the district is unable to negotiate a satisfactory contract with any of the selected firms, the district shall select additional firms in order of their competence and qualification and continue negotiations until an agreement is reached. (Government Code 4528)

The above procedures shall not apply if the Superintendent or designee determines that the services needed are more of a technical nature and involve little professional judgment and that requiring bids would be in the public interest. (Government Code 4529)

Contracts shall specify that all plans, including, but not limited to, record drawings, specifications, and estimates prepared by the architect or structural engineer shall become the property of the district: for the purpose of repair, maintenance, renovation, modernization, or other purposes, but only as they relate to the project for which the architect or structural engineer was retained. The contract shall also specify terms and conditions for reuse within the district of any plans prepared by the architect or structural engineer. (Education Code 17316)

CSBA NOTE: Education Code 17250.20 authorizes the district, until January 1, 2025, to utilize the design-build method of construction delivery for projects in excess of \$1,000,000. Additionally, pursuant to Education Code 17250.60-017250.69, as added by AB 185 (Ch. 571, Statutes of 2022), the district may, until January 1, 2029, utilize alternative design-build contracts for public works projects in excess of \$5,000,000. See AR 3311 – Bids and AR 3311.3 - Design-Build Contracts for more information regarding design-build.

A design-build contract may be awarded to a single entity for both design and construction of any school facility if the contract is in excess of \$1,000,000, or an alternative design-build contract may be awarded if the contract is in accordance with AR in excess of \$5,000,000, as specified in Administrative Regulation 3311.3 - Design-Build Contracts. (Education Code 17250.20), 17250.62)

Policy Reference UPDATE Service

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Policy Reference Disclaimer:

These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State

Description

24 CCR 101	California Building Standards Code
5 CCR 14001	Minimum standards for school facilities
5 CCR 14030-14036	Standards, planning, and approval of school facilities
Bus. Code 5500-5502	Architecture
Bus. Code 5550-5558	Architects; licensure
Bus. Code 6700-6706.3	Engineers <u>Professional Engineers Act</u>
Bus. Code 6750- 6766 <u>6767</u>	Engineers; licensure
CA Constitution Article 22	Architectural and engineering services
Ed. Code 17070.10-17079.30	Leroy F. Greene School Facilities Act
Ed. Code 17070.50	Conditions for apportionment
Ed. Code 17250.10-17250.55	Design-build contracts
<u>Ed. Code 17250.60-17250.69</u>	<u>Alternative design-build contracts</u>
Ed. Code 17251-17256	CDE powers concerning buildings and building sites
Ed. Code 17260-17268	Plans and specifications for school facilities
Ed. Code 17280- 17316 <u>17317</u>	Building approvals
Ed. Code 17302	Persons qualified to prepare plans, specifications and estimates and supervise construction
Ed. Code 17316	Contract provision re school district property
Ed. Code 17371	Limitation on liability of governing board
Gov. Code 14837	Definition of small business
Gov. Code 4525-4529.5	Contracts with private architects, engineering, land surveying, and construction project management firms
Gov. Code 87100	Public officials; financial interest
Pub. Cont. Code 20111 <u>20110-20118.44</u>	School district contracts
Management Resources	Description
California Department of Education Publication	Plan Submission Requirements for Modernization Projects, Form SFPD 4.08 https://www.cde.ca.gov/ls/fa/sf/documents/rev408jul10.doc
California Department of Education Publication	Plan Submission Requirements for New Construction, Form SFPD 4.07 https://www.cde.ca.gov/ls/fa/sf/documents/jan2015407.doc

Office of Public School Construction Publication	School Facility Program Handbook, January 2019 https://www.dgs.ca.gov/OPSC/Resources/Page-Content/Office-of-Public-School-Construction-Resources-List-Folder/Handbooks-Guides-and-Brochures
Website	CSBA District and County Office of Education Legal Services
Website	Department of General Services, Division of the State Architect
Website	American Institute of Architects California Council
Website	Department of General Services, Office of Public School Construction
Website	California Department of Education, School Facilities

Cross References

Code	Description
1240	Volunteer Assistance
1240	Volunteer Assistance
3311	Bids
3311	Bids
3311.3	Design-Build Contracts
3312	Contracts
3515.6	Criminal Background Checks For Contractors
7000	Concepts And Roles
7110	Facilities Master Plan
7150	Site Selection And Development
7150	Site Selection And Development
9270	Conflict Of Interest
9270-E(1)	Conflict Of Interest

Bylaw 9124: Attorney

Status: ADOPTED

Original Adopted Date: 06/01/1991 | **Last Revised Date:** 07/09/01/20082023 | **Last Reviewed Date:** 07/09/01/20082023

CSBA NOTE: Education Code 35041.5, 35204, and 35205 authorize the Governing Board to enter into a contract to hire an attorney as a district employee or independent contractor or to contract with a private firm to provide legal services for purposes deemed appropriate by the Board. According to the Rules of Professional Conduct of the State Bar of California, ([Rule 1.13](#)), when an attorney is hired by an organization such as a school district, the attorney's client is the district as a whole, and not an individual Board member or employee. However, at certain times an attorney may owe a duty of defense to a Board member or employee pursuant to the Tort Claims Act (Government Code 814-895.8). See [For more information regarding the Tort Claims Act, see BP/AR 3320 - Claims and Actions Against the District](#), and [for more information regarding protection against liability for Board members, see BB 9260 - Legal Protection](#).

The California Council

[Districts may subscribe to CSBA's District and County Office of School Attorneys](#), which provides professional opportunities for school attorneys, is a component of CSBA. CSBA has also established the Education Legal Alliance to initiate and support litigation in cases of statewide significance. [Services to school districts receive legal advice, services, and resources.](#)

The Governing Board recognizes the complex legal environment in which districts operate and desires, [the need to provide legal representation for the district, and the importance of](#) reliable, [cost-effective](#), high-quality legal advice at reasonable rates. [and services.](#)

In order to meet the district's legal needs, the Board may contract with county counsel, attorneys in private practice, or appoint legal counsel [and fix and order paid legal counsel's compensation](#) as a district [an](#) employee or [as an](#) independent contractor. ([Education Code 35041.5](#))

[The Board may enter into independent contractor services agreements with county counsel, law firms, attorneys in private practice, and other public or private legal services entities. \(Education Code 35204, 35205; Government Code 26520, 26529\)](#)

The Board also supports pursuing collaborative legal efforts with other agencies and districts as [well as other government agencies as](#) appropriate.

Duties of Legal Counsel

The district's legal counsel may: (Education Code 35041.5)

1. Render legal advice to the Board and the Superintendent or designee
2. Serve the Board and the Superintendent or designee in the preparation and conduct of district litigation and administrative proceedings

3. Render advice on school bond and tax increase measures and prepare the necessary forms for the voting of these measures
4. Perform other administrative duties as assigned by the Board and Superintendent or designee

Retaining Legal Counsel

CSBA NOTE: Government Code 53060 exempts contracts for legal services from the bidding requirements of the Public Contract Code; for more information regarding bidding requirements, see AR 3311 - Bids. However, when entering into a new contract for legal services, it is recommended that the Board Boards may use a Request for Proposal (RFP) procedure in order to solicit a range of proposals for services. The following optional section is for use by districts that contract with outside firms to provide legal services and should be modified to reflect district practice.

When the district is seeking legal advice or representation, the Superintendent or designee shall identify prospective attorney(s), firm(s), and/or legal services entity(ies).

The district may, but is not required to, initiate a Request for Proposals (RFP) to advertise and solicit proposals for legal services. In evaluating the proposals, prospective attorney(s), firm(s), and/or entity(ies), the Board and Superintendent shall may consider the firm's or attorney's, firm's, and/or entity's background, experience, and relevant legal reputation in education law; experience advising or and representing school districts in California; fees; and experience of attorneys at the firm who will provide legal services.

Any attorney representing the district shall be admitted to practice law in California. (Education Code 35041.5)

The Board and Superintendent shall annually periodically evaluate the performance of the firm(s) and/or attorneys providing legal services in such areas as attorney(s); the efficiency and adequacy of advice; the results obtained for the district; the reasonableness of fees; and the responsiveness to and interactions with the Board, administration, and community. Upon a successful

The Board may use such evaluation; the Board may(s) to determine whether to renew the any current agreement with(s) for legal counsel without initiating an RFP. services.

The Board may also contract for temporary, specialized legal services without initiating an RFP, as appropriate, when a majority of the Board determines that the unique demands of a particular issue or emergency situation so requires require such representation.

Contacting Legal Counsel

CSBA NOTE: The following section should be modified to reflect district practice.

At his/her discretion, the The Board president, or Superintendent or designee, may, at their discretion, confer with district legal counsel subject to any limits or parameters established by the Board. In addition, the Board president, or Superintendent or Board president designee, may contact district legal counsel to provide the Board with legal information or advice when so directed by a majority of the Board.

Individual Board members other than the Board president may not seek advice from district legal counsel on matters of district business unless so authorized by the Superintendent, the Board president, or a majority of the Board.

Policy Reference UPDATE Service

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Policy Reference Disclaimer:

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State

Ed. Code 35041

Description

Administrative adviser

Ed. Code 35041.5

Legal counsel

Ed. Code 35161

Board delegation of any powers or duties

Ed. Code 35200-35214

Liabilities

Ed. Code 35204

Contract with attorney in private practice

Ed. Code 35205

Contract for legal services

Gov. Code 26520

Legal services to school districts

[Gov. Code 26529](#)

[District Attorney](#)

Gov. Code 53060

Special services and advice

Gov. Code 814-895.8

Liability of public entities and public employees

Gov. Code 995-996.6

Defense of public employees

Management Resources

Description

CSBA Publication

The Brown Act: School Boards and Open Meeting Laws, rev. 2019

National School Boards Association
Publication

~~Selecting and Working with a School Attorney: A Guide for
School Boards, 1997~~

[State Bar of California Publication](#)

[California Rules of Professional Conduct](#)

Website

CSBA District and County Office of Education Legal Services

Website

State Bar of California

Website

California Council of School Attorneys

~~Website~~

~~[National School Boards Association](#)~~

Website

CSBA

Cross References

Code

Description

1160

Political Processes

1312.3

Uniform Complaint Procedures

1312.3

Uniform Complaint Procedures

1312.3-E(1)	Uniform Complaint Procedures
1312.3-E(2)	Uniform Complaint Procedures
1340	Access To District Records
1340	Access To District Records
2121	Superintendent's Contract
3311.2	Lease-Leaseback Contracts
3312	Contracts
3400	Management Of District Assets/Accounts
3400	Management Of District Assets/Accounts
4312.1	Contracts
9000	Role Of The Board
9200	Limits Of Board Member Authority
9260	Legal Protection
9321	Closed Session
9321-E(1)	Closed Session
9321-E(2)	Closed Session

CSBA POLICY GUIDE SHEET
Instructional Materials Special Packet October 2023

Note: Descriptions below identify revisions made to CSBA's sample board policies, administrative regulations, board bylaws, and/or exhibits. Editorial changes have also been made. Districts and county offices of education should review the sample materials and modify their own policies accordingly.

Board Policy 0410 - Nondiscrimination in District Programs and Activities

Policy updated to reflect **NEW LAW (AB 1078, 2023)** which (1) requires that the district's policy prohibiting discrimination, harassment, intimidation, and bullying include a statement that the policy applies to all acts of the Governing Board and Superintendent in enacting policies and procedures that govern the district, (2) clarifies when it is unlawful discrimination for the Board to refuse to approve the use or prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library, (3) requires the California Department of Education to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum, and (4) provides that complaints alleging discrimination related to the use or prohibited use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library may be brought under the district's uniform complaint procedures or may be directly filed with the Superintendent of Public Instruction, as specified. Policy also updated to reference **NEW U.S. DEPARTMENT OF EDUCATION OFFICE FOR CIVIL RIGHTS GUIDANCE** documents which provide that (1) a district may not separate students based on race, but may include group discussions or activities that focus on race as part of the curriculum, courses, or programs so long as access or participation is not permitted or limited based on race, (2) a school-sponsored program with emphasis on race, such as a student club, that is open to all students, typically would not violate Title VI solely because of its race-related theme, and (3) a district's responsibility not to discriminate against students applies to any of its programs or activities, whether directly or through contractual or other arrangements. Additionally, policy updated to expand the list of characteristics for which discrimination is prohibited in order to more closely align with law; and, to reflect **NEW LAW (SB 523, 2022)** which includes reproductive health decisionmaking as a characteristic for which employees, job applicants, unpaid interns and volunteers are protected against unlawful discrimination and harassment.

Board Policy 1312.2 - Complaints Concerning Instructional Materials

Policy updated to reflect **NEW LAW (AB 1078, 2023)** which (1) requires the California Department of Education (CDE) to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum, (2) clarifies when it is unlawful discrimination for the Governing Board to refuse to approve the use or prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library, (3) provides that complaints alleging discrimination related to the use or prohibited use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library may be brought under the district's uniform complaint procedures or may be directly filed with the Superintendent of Public Instruction, as specified, and (4) requires CDE to issue, by July 1, 2025, guidance regarding how to review instructional materials to ensure that they represent diverse perspectives and are culturally relevant. Policy also updated to expand and amend the list of criteria to be considered when instructional or library materials are being challenged; and, to provide that, unless required by law, any challenged material that is reviewed by the district will not be subject to further reconsideration for 12 months.

Administrative Regulation 1312.2 - Complaints Concerning Instructional Materials

Regulation updated to provide that for an instructional materials complaint for a nonprinted material the location of the objection be given; include that acknowledgement of receipt of an instructional materials complaint and notification of a review committee's decision be in writing; and, add that staff, in addition to the Superintendent or designee and teacher(s), be notified by the Principal as appropriate when an instructional materials complaint is received. Regulation also updated to delete material in the section

"Formal Complaint" related to a request by a parent/guardian who has filed a complaint for the student to be excused from using the challenged material while the complaint is pending; and, move the section "Review Committee" to come before the section "Superintendent Determination" so that it follows chronologically. Additionally, regulation updated to amend the section "Review Committee" to provide that (1) the Superintendent or designee may appoint parents/guardians and students, in addition to administrators and staff from relevant instructional and administrative areas, to serve on the committee, (2) include that the Superintendent or designee may provide training to the review committee to ensure the committee is informed regarding its responsibilities, applicable laws, and Board policies and administrative regulations when reviewing instructional materials, and (3) delete the list of criteria to be considered when instructional materials are being challenged, as this list is provided in the accompanying Board policy.

Exhibit(1) 1312.2 - Complaints Concerning Instructional Materials

Exhibit updated to specify that the "Request for Reconsideration of Existing Instructional Materials" form is for use when challenging the content of any existing textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or other resource in a school library. Exhibit also updated to accommodate for digital instructional materials; merge together portions of the form that are content related; and, change from a checklist to an open ended response the portion regarding the complainants preference for what should be done about a challenged instructional material.

Board Policy 1312.3 - Uniform Complaint Procedures

Policy updated to ensure compliance with the California Department of Education's (CDE) 2023-24 federal program monitoring instrument, and reflect **NEW LAW (AB 1078, 2023)** which (1) clarifies when it is unlawful discrimination for the Governing Board to refuse to approve the use or prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library, (2) provides that complaints alleging discrimination related to the use or prohibited use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library may be brought under the district's uniform complaint procedures or may be directly filed with the Superintendent of Public Instruction, as specified, and (3) requires CDE to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum. Policy also updated to reflect that the California Department of Fair Employment and Housing is now called the California Civil Rights Department.

Administrative Regulation 1312.3 - Uniform Complaint Procedures

Regulation updated to reference **NEW LAW (AB 1078, 2023)** which (1) clarifies when it is unlawful discrimination for the Governing Board to refuse to approve the use or prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library, (2) provides that complaints alleging discrimination related to the use or prohibited use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library may be brought under the district's uniform complaint procedures or may be directly filed with the Superintendent of Public Instruction, as specified, and (3) requires the California Department of Education (CDE) to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum. Regulation also updated to ensure compliance with CDE's 2023-24 federal program monitoring instrument

Administrative Regulation 1312.4 - Williams Uniform Complaint Procedures

Regulation updated to reflect **NEW LAW (AB 1078, 2023)** which (1) requires the California Department of Education (CDE) to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum, (2) provides that complaints related to instructional materials alleging that more than one student does not have sufficient textbooks or instructional materials as the result of an act by the Governing Board, or the Board's failure to remedy the deficiency, may be filed with the Superintendent of Public Instruction (SPI) directly, and the SPI may directly intervene without waiting for an investigation, and, (3) requires CDE, upon a finding that a district has not provided sufficient textbooks or instructional

materials, to take all remedial actions required by law, including purchasing textbooks and instructional materials and assessing a financial penalty against the district's local control funding formula. Regulation also updated to reflect **NEW LAW (SB 114, 2023)** which requires that the Williams uniform complaint procedure be used to address a complaint related to teacher misassignment that claims that a teacher who lacks credentials or training to teach English learners is assigned to teach a class with one or more English learners in the class, (formerly with more than 20 percent English learners in the class), and **NEW LAW (SB 760, 2023)** which authorizes districts to temporarily close a restroom for a documented student safety concern, an immediate threat to student safety, or to repair the facility.

Exhibit(1) 1312.4 - Williams Uniform Complaint Procedures

Exhibit updated to reference **NEW LAW (SB 760, 2023)** which authorizes districts to temporarily close a restroom for a documented student safety concern, an immediate threat to student safety, or to repair the facility, and **NEW LAW (SB 114, 2023)** which requires that the Williams uniform complaint procedure be used to address a complaint related to teacher misassignment that claims that a teacher who lacks credentials or training to teach English learners is assigned to teach a class with one or more English learners in the class, (formerly with more than 20 percent English learners in the class).

Exhibit(2) 1312.4 - Williams Uniform Complaint Procedures

Exhibit updated to reflect **NEW LAW (SB 114, 2023)** which requires that the Williams uniform complaint procedure be used to address a complaint related to teacher misassignment that claims that a teacher who lacks credentials or training to teach English learners is assigned to teach a class with one or more English learners in the class, (formerly with more than 20 percent English learners in the class), and **NEW LAW (SB 760, 2023)** which authorizes districts to temporarily close a restroom for a documented student safety concern, an immediate threat to student safety, or to repair the facility. Exhibit also updated to reflect **NEW LAW (AB 1078, 2023)** which provides that complaints related to instructional materials alleging that more than one student does not have sufficient textbooks or instructional materials as the result of an act by the Governing Board, or the Board's failure to remedy the deficiency, may be filed with the Superintendent of Public Instruction directly.

Board Policy 5145.3 - Nondiscrimination/Harassment

Policy updated to reflect **NEW LAW (AB 1078, 2023)** which (1) requires that the district's policy prohibiting discrimination, harassment, intimidation, and bullying include a statement that the policy applies to all acts of the Governing Board and the Superintendent in enacting policies and procedures that govern the district, and (2) clarifies when it is unlawful discrimination for the Board to refuse to approve the use or prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library. Policy also updated to provide that all allegations of unlawful discrimination in district programs and activities shall be brought, investigated, and resolved in accordance with the district's uniform complaint procedures. Additionally, policy updated to reflect **NEW U.S. DEPARTMENT OF EDUCATION OFFICE FOR CIVIL RIGHTS GUIDANCE** documents which (1) state that a district may not separate students based on race, but may include group discussions or activities that focus on race as part of the curriculum, courses, or programs so long as access or participation is not permitted or limited based on race, (2) provide that a school-sponsored program with emphasis on race, such as a student club, that is open to all students, typically would not violate Title VI solely because of its race-related theme, and (3) address discrimination in the use of discipline based on disability, race, and gender expression.

Board Policy 6143 - Courses of Study

Policy updated to expand the list of characteristics for which the district may not, on the basis of the student's actual or perceived characteristic, provide any course separately or require or refuse participation by any student, to more closely align with law.

Administrative Regulation 6143 - Courses of Study

Regulation updated to reflect **NEW LAW (AB 1078, 2023)** which (1) includes people of all genders (formerly "men and women"), Latino Americans (formerly "Mexican Americans"), LGBTQ+ Americans (formerly "lesbian, gay, bisexual, and transgender Americans"), and members of other ethnic, cultural, religious, and socioeconomic status groups (formerly "ethnic and cultural") to the groups for which

instruction in social studies is required to include a study of the role and contributions of. Regulation also updated to reflect the requirement for districts that offer a health education course to middle or high school students to include in such course mental health instruction.

Board Policy 6161.1 - Selection and Evaluation of Instructional Materials

Policy updated to reflect **NEW LAW (AB 1078, 2023)** which (1) requires the California Department of Education (CDE) to issue, by July 1, 2025, guidance regarding how to review instructional materials to ensure that they represent diverse perspectives and are culturally relevant, (2) requires CDE to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum, (3) requires the Governing Board to submit a copy of any resolution reflecting a finding of insufficient textbooks or other instructional materials to the County Superintendent of Schools no later than three business days after the hearing on such materials, (4) clarifies when it is unlawful discrimination for the Board to refuse to approve the use or prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library, and (5) provides that complaints alleging discrimination related to the use or prohibited use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library may be brought under the district's uniform complaint procedures or may be directly filed with the Superintendent of Public Instruction, as specified. Policy also updated to expand the list in the first philosophical statement regarding the Governing Board's desires for the district's instructional materials; clarify that instructional materials for mathematics and English language arts that are aligned to common core academic content standards are deemed to be aligned to state academic content standards adopted by the State Board of Education, move up the statement regarding the inclusion of the degree to which every student has sufficient access to standards-aligned instructional materials into the district's local control and accountability plan, and provide that the district shall take any action to ensure that each student has sufficient materials within two months of the beginning of the school year if the County Superintendent makes the district aware of a school that does not have sufficient instructional materials.

Administrative Regulation 6161.1 - Selection and Evaluation of Instructional Materials

Regulation updated to add that instructional materials being piloted by the district assess the extent to which the materials accurately reflect and value society's diversity. Regulation also updated to reflect **NEW LAW (AB 1078, 2023)** which includes people of all genders (formerly "men and women"), Latino Americans (formerly "Mexican Americans"), LGBTQ+ Americans (formerly "lesbian, gay, bisexual, and transgender Americans"), and members of other ethnic, cultural, religious, and socioeconomic status groups (formerly "ethnic and cultural") to the groups for which instruction in social studies is required to include a study of the role and contributions of, and (2) requires the California Department of Education to issue, by July 1, 2025, guidance regarding how to review instructional materials to ensure that they represent diverse perspectives and are culturally relevant. Additionally, regulation updated to include, for instructional materials being recommended for adoption by the Governing Board, that they include specified subject content requirements, support the district's local control and accountability plan, stimulate exploration of ideas and intellectual exchanges, and include options for materials in digital format.

Exhibit(1) 6161.1 - Selection and Evaluation of Instructional Materials

Exhibit updated to clarify that districts who have determined that sufficient materials were not provided to students at a district school(s) in a certain subject(s), should complete the section "Finding of Insufficient Textbooks or Instructional Materials in One or More Subjects" in addition to the section "Finding of Sufficient Textbooks or Instructional Materials." Exhibit also updated to separate out section regarding "Finding of Available Science Laboratory Equipment for Grades 9-12," and to clarify the definition of "sufficient textbooks or instructional materials" in regard to materials in digital format. Additionally, Exhibit updated to reflect **NEW LAW (AB 1078, 2023)** which requires the Governing Board to submit a copy of any resolution reflecting a finding of insufficient textbooks or other instructional materials to the County Superintendent of Schools no later than three business days after the hearing on such materials.

Board Policy 6161.11 - Supplementary Instructional Materials

Policy updated to reflect **NEW LAW (AB 1078, 2023)** which clarifies when it is unlawful discrimination for the Governing Board to refuse to approve the use or prohibit the use of any textbook, instructional material,

supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library, (2) requires the California Department of Education (CDE) to issue, by July 1, 2025, guidance regarding how to review instructional materials to ensure that they represent diverse perspectives and are culturally relevant, (3) requires CDE to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum, and (4) provides that complaints alleging discrimination related to the use or prohibited use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library may be brought under the district's uniform complaint procedures or may be directly filed with the Superintendent of Public Instruction, as specified. Policy also updated to delete the section "Supplementary Materials Aligned with Common Core Standards" as these interim materials are no longer necessary since the State Board of Education has adopted K-8 textbooks and instructional materials aligned to the Common Core Standards. Additionally, policy updated to include factual accuracy and whether the material contains pervasive vulgarity or profanity in the determination of compliance of supplemental materials with district criteria; and, add that the Superintendent or designee may provide training to administrators and teachers in the selection and evaluation of supplementary instructional materials, including the criteria to be utilized and applicable legal considerations.

Board Policy 6163.1 - Library Media Centers

Policy updated to expand the first philosophical paragraph regarding the Governing Board's recognition of how school libraries support the educational program and the Board's desire for books and other resources that are stocked in school libraries. Policy also updated to reflect **NEW LAW (AB 1078, 2023)** which clarifies when it is unlawful discrimination for the Board to refuse to approve the use or prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library, (2) requires the California Department of Education (CDE) to issue, by July 1, 2025, guidance regarding how to review instructional materials to ensure that they represent diverse perspectives and are culturally relevant, (3) requires CDE to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum, and (4) provides that complaints alleging discrimination related to the use or prohibited use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library may be brought under the district's uniform complaint procedures or may be directly filed with the Superintendent of Public Instruction, as specified. Additionally, policy updated in regard to the criteria for evaluation of the condition and use of school libraries to add (1) that the quality of the collection at each library include types of materials (fiction, non-fiction, newspapers, magazines, encyclopedias, materials in other languages, and reference materials), alignment with curriculum, and provision of a broad spectrum of knowledge and viewpoints, and (2) that principals, teachers, and library personnel have knowledge of the process to follow when a library material(s) is challenged.

Policy 0410: Nondiscrimination In District Programs And Activities

Status: ADOPTED

Original Adopted Date: 02/01/2014 | **Last Revised Date:** 05/10/01/20182023 | **Last Reviewed Date:** 05/10/01/20182023

CSBA NOTE: Education Code 234.1 mandates districts to adopt policy and regulations as well as a process to ensure that district programs and activities are free from unlawful discrimination. Education Code 234.1 requires that the district's nondiscrimination policy include a statement that the policy applies to all acts related to a school activity or school attendance and, as amended by AB 1078 (Ch. 229, Statutes of 2023), to all acts of the Governing Board and the Superintendent in enacting policies and procedures that govern the district. Education Code 234.1, as amended by AB 1078, contains similar language regarding the County Board of Education and the County Superintendent of Schools.

In accordance with various provisions of state and federal law, discrimination in education programs and activities is unlawful when it is based on certain actual or perceived characteristics of an individual. Education Code 220, as amended by AB 699 (Ch. 493, Statutes of 2017), prohibits discrimination based on race or ethnicity, nationality, immigration status, sex, sexual orientation, gender, gender identity, gender expression, religion, disability, or any other characteristic contained in the definition of hate crimes in Penal Code 422.55. Education Code 260 prohibits discrimination based on age. Government Code 11135 prohibits discrimination based on all many of the foregoing characteristics and on age, disability, and an individual's genetic information and medical condition. Title VI of the Civil Rights Act of 1964 (42 USC 2000d-2000d-7) prohibits discrimination on the basis of race, color, and national origin. Title IX (20 USC 1681-1688) prohibits discrimination on the basis of sex; gender, gender identity, pregnancy, and parental status. The Americans with Disabilities Act (ADA) (42 USC 12101-12213) and Section 504 of the Rehabilitation Act of 1973 (29 USC 794) prohibit discrimination on the basis of disability. For policy language protecting students against discrimination and harassment, see BP/AR 5145.3 - Nondiscrimination/Harassment and BP/AR 5145.7 - Sexual Harassment.

Education Code 260 and 5 CCR 4900-4965 require the Governing Board to monitor district compliance with these state and federal laws. The federal laws are enforced by the Office for Civil Rights (OCR) of the U.S. Department of Education, and the California Department of Education (CDE) may investigate complaints regarding discrimination pursuant to 5 CCR 4600-4670.

OCR's August 2023 Dear Colleague Letter, "Race and School Programming," states that a district may not separate students based on race, but may include group discussions or activities that focus on race as part of the curriculum, courses, or programs so long as access or participation is not permitted or limited based on race. OCR's guidance also provides that a school-sponsored program with emphasis on race, such as a student club, that is open to all students, typically would not violate Title VI solely because of its race-related theme.

Additionally, OCR's May 2023 Dear Colleague Letter, "Resource on Confronting Racial Discrimination in Student Discipline," published in conjunction with the U.S. Department of Justice (DOJ), states that a district's responsibility not to discriminate against students applies to any of its programs or activities, whether directly or through contractual or other arrangements.

Similarly, Government Code 12940 provides protections for employees, job applicants, unpaid interns, and volunteers against unlawful discrimination and harassment: on the basis of actual or

perceived race, color, ancestry, national origin, age, religious creed, marital status, pregnancy, physical or mental disability, medical condition, genetic information, veteran or military status, sex, sexual orientation, gender, gender identity, or gender expression, and, as amended by SB 523 (Ch. 630, Statutes of 2022), includes reproductive health decisionmaking. For policy language addressing these protections against discrimination as they relate to volunteers, see BP 1240 -- Volunteer Assistance, and in relation to employees, unpaid interns, and job applicants, see BP 4030 -- Nondiscrimination in Employment.

The Governing Board This policy shall apply to all acts related to a school activity or school attendance and to all acts of the Governing Board and the Superintendent in enacting policies and procedures that govern the district.

The Board is committed to providing equal opportunity for all individuals in district programs and activities. District programs, activities, and practices shall be free from unlawful discrimination, including discrimination against an individual or group based on race, color, ancestry, nationality, national origin, immigration status, ethnic group identification, ethnicity, age, religion, marital status, pregnancy, parental status, reproductive health decisionmaking, physical or mental disability, medical condition, sex, sexual orientation, gender, gender identity, gender expression, veteran or military status, or genetic information; a perception of one or more of such characteristics; or association with a person or group with one or more of these actual or perceived characteristics.

CSBA NOTE: Education Code 234.7, as added by AB 699 (Ch. 493, Statutes of 2017), mandates that districts adopt policy consistent with the California Attorney General's General's model policy contained in the Office of the Attorney General's General's publication, "Promoting a Safe and Secure Learning Environment for All: Guidance and Model Policies to Assist California's California's K-12 Schools in Responding to Immigration Issues." That model policy includes statements regarding the equitable provision of services and a prohibition against the use of school resources or data for creating a registry based on specific characteristics. In addition, Government Code 8310.3, as added by SB 31 (Ch. 826, Statutes of 2017), prohibits districts from disclosing information about immigration status or religion to federal government authorities for use in the compilation of a registry for immigration enforcement or otherwise assisting in the creation of such a registry. For more information regarding this mandate and appropriate responses to citizenship and immigration concerns, see BP/AR 5145.13 – Response to Immigration Enforcement.

All individuals shall be treated equitably in the receipt of district and school services. Personally identifiable information collected in the implementation of any district program, including, but not limited to, student and family information for the free and reduced-price lunch program, transportation, or any other educational program, shall be used only for the purposes of the program, except when the Superintendent or designee authorizes its use for another purpose in accordance with law. Resources and data collected by the district shall not be used, directly or by others, to compile a list, registry, or database of individuals based on race, gender, sexual orientation, religion, ethnicity, national origin, or immigration status or any other category identified above.

CSBA NOTE: Education Code 243, as added by AB 1078, clarifies when it is unlawful discrimination for the Board to (1) refuse to approve the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library or (2) prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library. The Board may not refuse to approve such use on the basis that the material includes a study of the role and contributions of specified individuals or groups, unless the study of the role and contributions reflects adversely upon legally protected groups. Additionally, the Board

may not prohibit such use on the basis that the study of the role and contributions contain inclusive or diverse perspectives.

Education Code 242, as added by AB 1078, requires CDE to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum.

District programs and activities shall be free of any discriminatory use, selection, or rejection of textbooks, instructional materials, library books, or similar educational resources.

The use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or other resource in a school library shall not be rejected or prohibited by the Board or district on the basis that it includes a study of the role and contributions of any individual or group consistent with the requirements of Education Code 51204.5 and 60040, unless such study would violate Education Code 51501 or 60044. (Education Code 243)

CSBA NOTE: Education Code 221.2-221.3 (the California Racial Mascot Act) declare the use of racially derogatory or discriminatory school or athletic team names, mascots, or nicknames to be contrary to an equal education and specifically prohibit public schools from using the term "Redskins" as a school or athletic team name, mascot, or nickname. The following paragraph expands this prohibition to include any racially derogatory or discriminatory athletic team name, mascot, or nickname and may be revised to reflect district practice.

District programs and activities shall be free of any racially derogatory or discriminatory school or athletic team names, mascots, or nicknames.

CSBA NOTE: Pursuant to Education Code 221.5, a district is required to permit a student to participate in sex-segregated school programs and activities, including athletic teams and competitions, and to use facilities consistent with the student's gender identity, regardless of his/her the student's gender as listed on his/her the student's educational records. See BP/AR 5145.3 - Nondiscrimination/Harassment.

For further information, see CSBA's Updated “Legal Guidance: Protecting on Rights of Transgender and Gender Nonconforming Students Against Sex Discrimination in Schools,” and CSBA's Recently Asked Questions, “Parental and Student Rights in Relation to Transgender and Gender Nonconforming Students.”

The Superintendent or designee shall annually review district programs and activities to ensure the removal of any derogatory or discriminatory name, image, practice, or other barrier that may unlawfully prevent an individual or group in any of the protected categories stated above from accessing district programs and activities. He/she The Superintendent or designee shall take prompt, reasonable actions to remove any identified barrier. The Superintendent or designee shall report his/her the findings and recommendations to the Board after each review.

All allegations of unlawful discrimination in district programs and activities shall be investigated and resolved in accordance with the procedures specified in AR 1312.3 - Uniform Complaint Procedures.

CSBA NOTE: Complaints alleging discrimination based on a violation of Education Code 243, as added by AB 1078, related to the use or prohibited use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library, as described above, may be brought under the district's uniform complaint procedures (UCP) or may be filed directly with the Superintendent of Public Instruction

(SPI). Complaints that are filed directly with the SPI are required to identify the basis for doing so, and present evidence that supports the basis for the direct filing. In such cases, the SPI may directly intervene without waiting for an investigation by the district. See BP/AR 1312.3 – Uniform Complaint Procedures.

All allegations of unlawful discrimination in district programs and activities shall be brought, investigated, and resolved in accordance with Board Policy 1312.3 – Uniform Complaint Procedures.

CSBA NOTE: Many nondiscrimination laws and regulations contain a notification requirement. For example, pursuant to 34 CFR 104.8 and 106.98, a district that receives federal aid is required to take "continuing steps" to notify students, parents/guardians, employees, employee organizations, and applicants for admission and employment that it does not discriminate on the basis of disability or sex in its educational programs or activities. In addition, Education Code 221.61 requires districts to post specified information relating to Title IX on their ~~web sites~~websites. To ensure consistent implementation of the laws, the same notification requirement should be adopted for all the protected categories as provided in the following paragraph.

Pursuant to 34 CFR 104.8 and 34 CFR 106.98, the Superintendent or designee shall notify students, parents/guardians, employees, employee organizations, applicants for admission and employment, and sources of referral for applicants about the district's policy on nondiscrimination and related complaint procedures. Such notification shall be included in the annual parental notification distributed pursuant to Education Code 48980 and, as applicable, in announcements, bulletins, catalogs, handbooks, application forms, or other materials distributed by the district. The notification shall also be posted on the district's ~~web site~~website and social media and in district schools and offices, including staff lounges, student government meeting rooms, and other prominent locations as appropriate.

CSBA NOTE: Education Code 234.7, as added by AB 699 (Ch. 493, Statutes of 2017), requires the following notification. Information about the educational rights of all students is contained in the appendix of the Office of the Attorney General's publication, "Promoting a Safe and Secure Learning Environment for All: Guidance and Model Policies to Assist California's K-12 Schools in Responding to Immigration Issues."

In addition, the annual parental notification shall inform parents/guardians of their children's right to a free public education regardless of immigration status or religious beliefs, including information on educational rights issued by the California Attorney General. Alternatively, such information may be provided through any other cost-effective means determined by the Superintendent or designee. (Education Code 234.7)

CSBA NOTE: Pursuant to Education Code 48985, when 15 percent or more of students enrolled in a school speak a single primary language other than English, all notices and reports sent to the parents/guardians of these students must also be written in the primary language and may be answered by the parent/guardian in English or the primary language. In addition, 20 USC 6311 and 6312 require that districts receiving Title I funds provide parent/guardian notices in an understandable and uniform format and, to the extent practicable, in a language that parents/guardians understand.

The district's nondiscrimination policy and related informational materials shall be published in a format that parents/guardians can understand. In addition, when 15 percent or more of a school's students speak a single primary language other than English, those materials shall be translated into that other language. (Education Code 48985; 20 USC 6312)

Access for Individuals with Disabilities

CSBA NOTE: Pursuant to the ADA and its implementing regulations, 28 CFR 35.150 and 35.151, district facilities must be accessible to and usable by individuals with disabilities. Compliance methods may include equipment redesign, reassignment of services to accessible buildings, assignment of aides to beneficiaries, home visits, delivery of services at alternate accessible sites, and alteration of existing facilities and construction of new facilities. In achieving compliance, a district need not make structural changes to existing facilities if other methods are effective and the district can demonstrate that the structural change would result in a fundamental alteration in the nature of the activity or an undue financial or administrative burden. However, pursuant to 28 CFR 35.151, all newly constructed facilities must comply with the 2010 ADA Standards for Accessible Designs issued by the U.S. Department of Justice. [DOJ](#).

In addition, pursuant to 28 CFR 35.136, a district must permit an individual with a disability to be accompanied by a service animal on district premises when, without the animal's assistance, the individual with a disability will not be able to access or participate in a district program or activity. For language addressing this mandate, see AR 6163.2 - Animals at School. Districts with questions about compliance with the ADA should consult with [CSBA's District and County Office of Education Legal Services](#) or district legal counsel as appropriate.

District programs and facilities, viewed in their entirety, shall be in compliance with the Americans with Disabilities Act (ADA) and any implementing standards and/or regulations. When structural changes to existing district facilities are needed to provide individuals with disabilities access to programs, services, activities, or facilities, the Superintendent or designee shall develop a transition plan that sets forth the steps for completing the changes.

CSBA NOTE: Pursuant to 28 CFR 35.130 and 35.160, the ADA requires districts to provide services and aids to ensure that a disabled individual is not excluded from participation or denied a benefit, service, or program on the basis of a disability. However, if the district can show that providing such aids and services would fundamentally alter the nature of the function, program, or meeting or would be an undue burden, then the district need not provide them.

[The requirement to provide services and aids extends to qualified individuals with speech, hearing, or vision disabilities who participate in Medi-Cal, and, in accordance with the Department of Health Care Services Policy and Procedure Letters No. 21-017R and No. 23-004, districts are required to have a plan to meet these alternative format requirements; see AR 5141.6 - School Health Services.](#)

In addition, Government Code 54953.2 requires that all Board meetings meet the protections of the ADA and implementing regulations (28 CFR 35.160 and 36.303). ~~In effect, the~~ [The](#) district must ensure that such meetings are accessible to persons with disabilities and that, upon the request of any person with a disability, disability-related accommodations, such as auxiliary aids and services, are made available. [Additionally, Government Code 54953, as amended by AB 2449 \(Ch. 285, Statutes of 2022\), requires boards to maintain and implement a procedure for receiving and swiftly resolving requests for reasonable accommodation for individuals with disabilities, consistent with the ADA, and to resolve any doubt in favor of accessibility. See BB 9320 - Meetings and Notices and BB 9322 - Agenda/Meeting Materials.](#)

OCR has interpreted the ADA and Section 504 of the Rehabilitation Act of 1973 to include the requirement that district ~~web sites~~ [websites](#) be accessible to individuals with disabilities. See ~~the~~ OCR's June 2010 and May 2011 Dear Colleague Letters and BP 1113 - District and School ~~Web Sites~~ [Websites](#).

The Superintendent or designee shall ensure that the district provides appropriate auxiliary aids and services when necessary to afford individuals with disabilities equal opportunity to participate in or

enjoy the benefits of a service, program, or activity. These aids and services may include, but are not limited to, qualified interpreters or readers, assistive listening devices, assistive technologies or other modifications to increase accessibility to district and school ~~web sites~~websites, notetakers, written materials, taped text, and Braille or large-print materials. Individuals with disabilities shall notify the Superintendent or ~~principal~~designee if they have a disability that requires special assistance or services. Reasonable notification should be given prior to a school-sponsored function, program, or meeting.

CSBA NOTE: Pursuant to 28 CFR 35.107, a district that has 50 or more employees is required to designate at least one employee to coordinate the district's efforts to comply with the ADA. The designated employee could be the same individual or position responsible for the district's compliance with state and federal laws and regulations governing educational programs as identified in the district's ~~uniform complaint~~UCP procedures. The following paragraph, which identifies the person or position identified in the AR 1312.3 - Uniform Complaint Procedures as the responsible employee, may be modified if the district chooses to designate another person or position.

The individual identified in ~~AR~~Administrative Regulation 1312.3 - Uniform Complaint Procedures as the employee responsible for coordinating the district's response to complaints and for complying with state federal civil rights laws is hereby designated as the district's ADA coordinator. ~~He/she~~The compliance officer shall receive and address requests for accommodation submitted by individuals with disabilities, and shall investigate and resolve complaints regarding their access to district programs, services, activities, or facilities.

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Policy Reference UPDATE Service

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Policy Reference Disclaimer:

These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State	Description
5 CCR 4600-4670	Uniform complaint procedures
5 CCR 4900-4965	Nondiscrimination in elementary and secondary educational programs receiving state or federal financial assistance
Ed. Code 200-262.4	Prohibition of discrimination
Ed. Code 48980	Parent/Guardian notifications
Ed. Code 48985	Notices to parents in language other than English
Ed. Code 51007	Legislative intent; state policy

Ed. Code 51204.5	Social sciences instruction; contributions of specified groups
Ed. Code 51501	Nondiscriminatory subject matter
Ed. Code 60010	Instructional materials; definition
Ed. Code 60040-60052	Requirements for instructional materials
Gov. Code 11000	Definitions
Gov. Code 11135	Prohibition of discrimination
Gov. Code 12900-12996	Fair Employment and Housing Act
Gov. Code 54953	Meetings; Americans with Disabilities Act accessibility
Gov. Code 54953.2	Brown Act compliance with Americans with Disabilities Act
Gov. Code 8310.3	California Religious Freedom Act
Pen. Code 422.55	Definition of hate crime
Pen. Code 422.6	Crimes; harassment
Federal	Description
20 USC 1400-1482	Individuals with Disabilities Education Act
20 USC 1681-1688	Title IX of the Education Amendments of 1972; discrimination based on sex
20 USC 2301-2414	Strengthening Career and Technical Education for the 21st Century Act
20 USC 6311	State plan
20 USC 6312	Local educational agency plan
28 CFR 35.101-35.190	Americans with Disabilities Act
28 CFR 36.303	Nondiscrimination on the basis of disability, public accommodations, auxiliary aids, and services
29 USC 794	Rehabilitation Act of 1973; Section 504
34 CFR 100.1-100.13	Nondiscrimination in federal programs; effectuating Title VI
34 CFR 104.1-104.39	Section 504 of the Rehabilitation Act of 1973
34 CFR 106.1-106.6182	Discrimination on the basis of sex; effectuating Title IX
34 CFR 106.9	Severability
42 USC 12101-12213	Americans with Disabilities Act
42 USC 2000d-2000d-7	Title VI, Civil Rights Act of 1964
42 USC 2000e-2000e-17	Title VII, Civil Rights Act of 1964, as amended
Management Resources	Description
CA Civil Rights Department Publication	California Law Prohibits Workplace Discrimination and Harassment https://calcivilrights.ca.gov/wp-content/uploads/sites/32/2023/01/Workplace-Discrimination-Poster_ENG.pdf

<u>CA Department of Health Care Policy and Procedures Letter No. 23-004, February 2023 Services Publication</u>	
<u>CA Department of Health Care Policy and Procedures Letter No. 21-017R, December 2021 Services Publication</u>	
CA Office of the Attorney General Publication	Promoting a Safe and Secure Learning Environment for All: <u>Guidance and Model Policies to Assist California's K-12 Schools in Responding to Immigration Issues, April 2018</u> (https://oag.ca.gov/sites/all/files/agweb/pdfs/bcj/school-guidance-model-k12.pdf)
CSBA Publication	Updated Legal Guidance: Protecting on Rights of Transgender and Gender Nonconforming Students Against Sex Discrimination, March 2017 <u>in Schools, October 2022</u> (https://www.csba.org/-/media/CSBA/Files/Advocacy/LegalAdvocacy/Legal-Guidance-Transgender-Legal-10-2022.ashx?la=en&rev=a3fb600ee6d640598c038dfceaef871c)
<u>CSBA Publication</u>	<u>Parental and Student Rights in Relation to Transgender and Gender Nonconforming Students, Recently Asked Questions, August 2023</u>
<u>U.S. Department of Justice Publication, Civil Rights Division Publication</u>	<u>Guidance on Web Accessibility and the ADA, March 2022</u>
U.S. Department of Justice, <u>Civil Rights Division</u> Publication	Accessibility of State and Local Government Websites to People with Disabilities, June 2003 <u>February 2020</u> (https://www.ada.gov/resources/accessibility-govt-websites/)
U.S. Department of Justice, <u>Civil Rights Division</u> Publication	2010 ADA Standards for Accessible Design, September 2010 (https://www.ada.gov/law-and-regs/design-standards/2010-stds/)
U.S. DOE, Office for Civil Rights Publication	Dear Colleague Letter, May 26, 2011 : <u>Race and School Programming, August 2023</u> (https://www2.ed.gov/about/offices/list/ocr/letters/colleague-20230824.pdf)
U.S. DOE, Office for Civil Rights Publication	<u>Dear Colleague Letter: Frequently Asked Questions About the June 29, 2010, Dear Colleague Letter, May 26, 2011</u> (https://www2.ed.gov/about/offices/list/ocr/letters/colleague-201105-pse.pdf)
U.S. DOE, Office for Civil Rights Publication	Dear Colleague Letter: <u>Electronic Book Readers, June 29, 2010</u> (https://www2.ed.gov/about/offices/list/ocr/letters/colleague-20100629.pdf)
U.S. DOE, Office for Civil Rights Publication	Dear Colleague Letter: Title IX Coordinators, April 2015 <u>Supporting Transgender Youth in School, June 2021</u> (https://www2.ed.gov/about/offices/list/ocr/docs/ed-factsheet-transgender-202106.pdf)
U.S. DOE, Office for Civil Rights <u>and U.S. DOJ, Civil Rights Division</u> Publication	<u>Examples of Policies and Emerging Practices for Supporting Transgender Students, May 2016</u> <u>Dear Colleague Letter: Resource on Confronting Racial Discrimination in Student Discipline, May 2023</u> (https://www2.ed.gov/about/offices/list/ocr/docs/tvi-student-discipline-resource-202305.pdf)
U.S. DOE, Office for Civil	Nondiscrimination in Employment Practices in Education, August 1991

Rights Publication	https://www2.ed.gov/about/offices/list/ocr/docs/hq53e8.html
U.S. DOE, Office for Civil Rights Publication	Notice of Non-Discrimination, Fact Sheet, August 2010
Website	CSBA District and County Office of Education Legal Services
Website	World Wide Web Consortium, Web Accessibility Initiative
Website	Pacific ADA Center
Website	U.S. Department of Justice, Civil Rights Division, Disability Rights Section
Website	California Office of the Attorney General
Website	California Safe Schools Coalition
Website	CSBA
Website	California Department of Education
Website	California Civil Rights Department
Website	California Department of Health Care Services (https://www.dhcs.ca.gov/)
Website	U.S. Equal Employment Opportunity Commission
Website	U.S. Department of Education, Office for Civil Rights
World Wide Web Consortium Publication	Web Content Accessibility Guidelines, December 2008

Cross References

Code	Description
0100	Philosophy
0415	Equity
0450	Comprehensive Safety Plan
0450	Comprehensive Safety Plan
0470	COVID-19 Mitigation Plan
1100	Communication With The Public
1113	District And School Websites
1113	District And School Websites
1113-E(1)	District And School Websites
1114	District-Sponsored Social Media
1114	District-Sponsored Social Media
1230	School-Connected Organizations
1230	School-Connected Organizations

1240	Volunteer Assistance
1240	Volunteer Assistance
1260	Educational Foundation
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4319.22	Dress And Grooming
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Policy 1312.2: Complaints Concerning Instructional Materials

Status: ADOPTED

Original Adopted Date: 09/01/1988 | **Last Revised Date:** 03/10/01/2006/2023 | **Last Reviewed Date:** 03/10/01/2006/2023

CSBA NOTE: The following optional policy and the accompanying administrative regulation, and exhibit are for complaints concerning the content or use of any existing textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or other resource in a school library, and should be revised to reflect district practice.

Pursuant to Education Code 242, as added by AB 1078 (Ch. 229, Statutes of 2023), the California Department of Education (CDE) is required to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum.

For complaints regarding the sufficiency of instructional materials or textbooks pursuant to Education Code 35186, see AR/E(1)/E(2) 1312.4 - Williams Uniform Complaint Procedures.

For more information regarding the selection, evaluation, and prohibited use of individual instructional materials, see BP/AR 6161.1 - Selection and Evaluation of Instructional Materials, BP 6161.11 - Supplementary Instructional Materials, and BP 6163.1 - Library Media Centers.

The Governing Board uses a comprehensive process to adopt district instructional materials that is based on selection criteria established by law and Board policy and includes opportunities for the involvement of district staff, parents/guardians, and community members, and, as appropriate, students. Complaints concerning the content or use of instructional materials, including textbooks, supplementary instructional materials, library materials, or other instructional materials and equipment, shall be properly and fairly considered using established complaint procedures.

Parents/guardians are encouraged to discuss any concerns regarding instructional materials with their child's teacher and/or the school principal. If the situation remains unresolved, a complaint may be filed using the process specified in the accompanying administrative regulation: and exhibit.

The district shall accept complaints concerning instructional materials only from staff, district residents, or the parents/guardians of children enrolled in a district school. (Education Code 35160)

When deliberating upon challenged materials, the Superintendent and/or review committee shall consider the educational philosophy of the district, the professional opinions of teachers of the subject and of other competent authorities, reviews of the materials by reputable bodies, the teacher's stated objectives in using the materials, community standards, and the objections of the complainant.

Complainants are encouraged to accept the Superintendent's or review committee's decision. However, if the complainant finds that decision unsatisfactory, he/she may appeal the decision to the Board.

The district's decision shall be based on educational suitability of the materials and the criteria established in Board policy and administrative regulation.

CSBA NOTE: Education Code 243, as added by AB 1078, clarifies when it is unlawful discrimination for the Governing Board to (1) refuse to approve the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or other resource in a school library or (2) prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or other resource in a school library. The Board may not refuse to approve such use on the basis that the material includes a study of the role and contributions of specified individuals or groups, unless the study of the role and contributions reflects adversely upon legally protected groups. Additionally, the Board may not prohibit such use on the basis that the study of the role and contributions contain inclusive or diverse perspectives.

Complaints alleging discrimination based on a violation of Education Code 243, as added by AB 1078, may be brought under the district's uniform complaint procedures or may be filed directly with the Superintendent of Public Instruction (SPI). Complaints that are filed directly with the SPI are required to identify the basis for doing so, and present evidence that supports the basis for the direct filing. In such cases, the SPI may directly intervene without waiting for an investigation by the district. See BP/AR 1312.3 – Uniform Complaint Procedures.

However, a complaint related to the use or prohibited use of any existing textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or other resource in a school library that alleges unlawful discrimination based on a violation of Education Code 243 shall be filed, investigated, and resolved in accordance with Board Policy 1312.3 – Uniform Complaint Procedures.

CSBA NOTE: Pursuant to Education Code 60040.5, as added by AB 1078, CDE is required to issue, by July 1, 2025, guidance regarding how to review instructional materials to ensure that they represent diverse perspectives and are culturally relevant.

When deliberating upon challenged materials, the Superintendent, or any designee or committee established by the Superintendent to review the materials, shall consider the degree to which the materials aligned with the criteria for instructional materials as specified in law, Board policy, and administrative regulation. In addition, such deliberations may consider the educational philosophy and vision of the district; the educational suitability of the materials including the manner in which the materials support the curriculum and appropriateness for the student's age; the professional opinions of teachers of the subject and of other competent authorities and/or experts; reviews of the materials by reputable bodies; the stated objectives in using the materials; community standards; the allegations in the complaint, including the extent to which the objections are based on the dislike of ideas contained in the materials; and the impact that keeping or removing the materials would have on student well-being.

CSBA NOTE: Education Code 243, as added by AB 1078, clarifies that it is unlawful discrimination for the Board to prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or other resource in a school library on the basis that it contains inclusive or diverse perspectives. While Education Code 243 is specifically applicable to boards, districts should assume that any similar decision by the Superintendent, designee, or any committee established by the Superintendent would likely constitute unlawful discrimination as well; see BP 6161.1 – Selection and Evaluation of Instructional Materials.

The Superintendent, or any designee or committee established by the Superintendent to review the materials, shall not prohibit the continued use of an appropriately adopted textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or other resource in a school library on the basis that it contains inclusive and/or diverse perspectives, as specified in Education Code 243.

If the complainant finds the Superintendent's or review committee's decision unsatisfactory, the complainant may appeal the decision to the Board.

CSBA NOTE: The following optional paragraph limits reconsideration within a specified time period and should be modified to reflect district practice.

~~When any~~Any challenged instructional material that is reviewed by the district, it shall not be subject to further reconsideration for 12 months, unless ~~the Superintendent determines that reconsideration is warranted~~required by law.

CSBA NOTE: Education Code 35186 details a specific process that districts must use to resolve complaints regarding sufficiency/availability of instructional materials or textbooks. See AR/E(1)/E(2) 1312.4 - Williams Uniform Complaint Procedures.

Pursuant to Education Code 60119, boards are required to hold a public hearing annually regarding the sufficiency of instructional materials. If, at the public hearing, the Board makes a determination of "insufficient materials", Education Code 1240, as amended by AB 1078, requires the Board to take certain actions and specifies potential consequences for not remedying the deficiency as required by law; see BP 6161.1 – Selection and Evaluation of Instructional Materials.

Complaints related to the sufficiency of textbooks or instructional materials shall be resolved ~~pursuant to the district's~~as specified in Administrative Regulation 1312.4 – Williams uniform complaint procedure at AR 1312.4Uniform Complaint Procedures.

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State

5 CCR 4600-4670

Ed. Code 18111

Description

Uniform complaint procedures

Exclusion of books by Governing board that are sectarian, partisan, or denominational character

Ed. Code 220

Prohibition of discrimination

Ed. Code 242

Access to information about educational laws and policies regarding right to accurate and inclusive curriculum

Ed. Code 243

Unlawful discrimination related to the use or prohibited use of textbooks and instructional materials

Ed. Code 1240

County superintendent of schools; duties

Ed. Code 35010

Control of district; prescription and enforcement of rules

Ed. Code 35160

Powers and duties of school boards

Ed. Code 35186

Williams uniform complaint procedures

Ed. Code 44805

Teacher enforcement of course of studies; use of textbooks, rules and regulations

Ed. Code 44805	Enforcement of course of studies; use of textbooks, rules and regulations
Ed. Code 48907	Exercise of free expression; time, place and manner rules and regulations
Ed. Code 48950	Speech and other communication
Ed. Code 51204.5	Social sciences instruction; contributions of specified groups
Ed. Code 51501	Subject matter reflecting on race, color, etc. Nondiscriminatory subject matter
Ed. Code 51511	Religious matters properly included in courses of study
Ed. Code 51933	Sexual health education and HIV prevention materials
Ed. Code 60000-60005	Instructional materials; legislative intent
Ed. Code 60040- 60048 60052	Instructional requirements and materials Requirements for instructional materials
Ed. Code 60119	Public hearing on sufficiency of materials Public hearing on sufficiency of textbooks and instructional materials
Ed. Code 60200- 60206 60213	Elementary school materials
Ed. Code 60226	Requirements for publishers and manufacturers
Ed. Code 60400-60411	High school textbooks and instructional materials
Ed. Code 60510-60511	Donation or sale of obsolete instructional materials
Management Resources	Description
California Department of Education Publication	Selection of Instructional Materials; CIL: 90/91-02 FAQ
California Department of Education Publication	Standards for Evaluation of Evaluating Instructional Materials with Respect to for Social Content, 1986 2013 edition; revised 2001
Website	CSBA District and County Office of Education Legal Services
Website	California Department of Education, Curriculum and Instruction Resources
Website	CSBA
Website	Department of Justice (https://oag.ca.gov/)
Website	U.S. Department of Education, Office for Civil Rights (https://www2.ed.gov/about/offices/list/ocr/index.html)

Cross References

Code	Description
0410	Nondiscrimination in District Programs and Activities
1100	Communication With The Public
1250	Visitors/Outsiders

1250	Visitors/Outsiders
1312.1	Complaints Concerning District Employees
1312.1	Complaints Concerning District Employees
1312.3	Uniform Complaint Procedures
1312.3	Uniform Complaint Procedures
1312.3-E(1)	Uniform Complaint Procedures
1312.3-E(2)	Uniform Complaint Procedures
1312.4	Williams Uniform Complaint Procedures
1312.4-E(1)	Williams Uniform Complaint Procedures
1312.4-E(2)	Williams Uniform Complaint Procedures
<u>5145.3</u>	<u>Nondiscrimination/Harassment</u>
6000	Concepts And Roles
6141	Curriculum Development And Evaluation
6141	Curriculum Development And Evaluation
6142.6	Visual And Performing Arts Education
6142.92	Mathematics Instruction
6142.94	History-Social Science Instruction
<u>6143</u>	<u>Courses Of Study</u>
6144	Controversial Issues
6161.1	Selection And Evaluation Of Instructional Materials
6161.1	Selection And Evaluation Of Instructional Materials
6161.1-E(1)	Selection And Evaluation Of Instructional Materials
6161.11	Supplementary Instructional Materials
6161.2	Damaged Or Lost Instructional Materials
6163.1	Library Media Centers
9000	Role Of The Board
9005	Governance Standards
9012	Board Member Electronic Communications
9200	Limits Of Board Member Authority
9322	Agenda/Meeting Materials

Regulation 1312.2: Complaints Concerning Instructional Materials

Status: ADOPTED

Original Adopted Date: 12/01/1990 | **Last Revised Date:** 03/10/01/2006/2023 | **Last Reviewed Date:** 03/10/01/2006/2023

CSBA NOTE: The following optional regulation is for complaints concerning the content or use of any existing textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or other resource in a school library, and should be modified to reflect district practice. Complaints alleging unlawful discrimination based on a violation of Education Code 243, as added by AB 1078 (Ch. 229, Statutes of 2023), related to the use or prohibited use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or other resource in a school library are required to be investigated or resolved in accordance with the procedures specified in BP/AR 1312.3 – Uniform Complaint Procedures, or may be directly filed with the Superintendent of Public Instruction. For a specific process that districts must use to resolve complaints regarding the sufficiency of instructional materials or textbooks pursuant to Education Code 35186, see AR/E(1)/E(2) 1312.4 - Williams Uniform Complaint Procedures.

For more information regarding the selection, evaluation, and prohibited use of individual instructional materials, see BP/AR 6161.1 – Selection and Evaluation of Instructional Materials, BP 6161.11 – Supplementary Instructional Materials, and BP 6163.1 – Library Media Centers.

Step 1: Informal Complaint

If a staff member, district resident, or parent/guardian of a student enrolled in a district school has a complaint regarding the content or use of any specific instructional material, he/she such individual shall informally discuss the material in question with the principal. (Education Code 35160)

Step 2: Formal Complaint

If the complainant is not satisfied with the principal's initial response, he/she the complainant shall present a written complaint to the principal. Complaints regarding printed material shall name the author, title, and publisher and shall identify the objection by page and item numbers. In the case of nonprinted material, written information specifying the precise nature of the objection and location of such material shall be given. Complainants In order for the district to reply appropriately, complainants shall sign all complaints and provide identifying information so that the district is able to make a proper reply. Anonymous complaints will not be accepted.

Upon receiving a complaint, the principal shall acknowledge provide the complainant with a written acknowledgement of its receipt and answer respond to any procedural questions regarding procedure. the complainant may have. The principal then shall then notify the Superintendent or designee and, the teacher(s) involved of the complaint), and other staff as appropriate.

During the investigation of the complaint, the challenged material may remain in use until a final decision has been reached. However, upon request of the parent/guardian who has filed the complaint, his/her child may be excused from using challenged materials until a resolution has been reached. The teacher shall assign the student an alternate material of equal merit.

Step 3: Superintendent Determination Review Committee

The Superintendent or designee shall determine whether to convene a review committee should be convened to review the complaint.

If the Superintendent or designee determines that a review committee is not necessary, he/she shall issue a decision regarding the complaint.

Step 4: Review Committee

If the Superintendent or designee determines that a review committee is necessary, he/she shall appoint a committee composed of administrators and staff members selected from relevant instructional and administrative areas. The Superintendent or designee may also appoint parents/guardians, students, and community members, as appropriate, to serve on the committee.

The Superintendent or designee may provide training to the review committee shall to ensure that the review committee is informed regarding its responsibilities, the criteria specified into follow when reviewing instructional materials, and applicable laws, Board policy and shall determine the extent to which the challenged material supports the curriculum, the educational appropriateness of the material, and its suitability for the age level of the student. (ies), and administrative regulation(s).

Within 30 days of being convened, the review committee shall summarize its findings in a written report. The Superintendent or designee shall notify the complainant in writing of the committee's decision within 15 days of receiving the committee's report.

Step 5: Appeal to the Governing Board

If the complainant remains unsatisfied, he/she may appeal the Superintendent's or the review committee's decision to the Board. ~~The Board's decision shall be final.~~

Step 4: Superintendent Determination

If the Superintendent or designee determines that a review committee is not necessary, the Superintendent or designee shall, in a timely manner, issue a decision regarding the complaint.

Step 5: Appeal to the Governing Board

If the complainant remains unsatisfied, the complainant may appeal the Superintendent's or review committee's decision to the Board. The Board's decision shall be final.

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State

5 CCR 4600-4670

Description

Uniform complaint procedures

Ed. Code 18111	Exclusion of books by Governing board <u>that are sectarian, partisan, or denominational character</u>
<u>Ed. Code 220</u>	<u>Prohibition of discrimination</u>
<u>Ed. Code 242</u>	<u>Access to information about educational laws and policies regarding right to accurate and inclusive curriculum</u>
<u>Ed. Code 243</u>	<u>Unlawful discrimination related to the use or prohibited use of textbooks and instructional materials</u>
<u>Ed. Code 1240</u>	<u>County superintendent of schools; duties</u>
Ed. Code 35010	Control of district; prescription and enforcement of rules
<u>Ed. Code 35160</u>	<u>Powers and duties of school boards</u>
Ed. Code 35186	Williams uniform complaint procedures
<u>Ed. Code 44805</u>	<u>Teacher enforcement of course of studies; use of textbooks, rules and regulations</u>
Ed. Code 44805	Enforcement of course of studies; use of textbooks, rules and regulations
<u>Ed. Code 48907</u>	<u>Exercise of free expression; time, place and manner rules and regulations</u>
<u>Ed. Code 48950</u>	<u>Speech and other communication</u>
<u>Ed. Code 51204.5</u>	<u>Social sciences instruction; contributions of specified groups</u>
Ed. Code 51501	Subject matter reflecting on race, color, etc. <u>Nondiscriminatory subject matter</u>
<u>Ed. Code 51511</u>	<u>Religious matters properly included in courses of study</u>
<u>Ed. Code 51933</u>	<u>Sexual health education and HIV prevention materials</u>
Ed. Code 60000-60005	Instructional materials; legislative intent
Ed. Code 60040- 60048 <u>60052</u>	Instructional requirements and materials <u>Requirements for instructional materials</u>
Ed. Code 60119	Public hearing on sufficiency of materials <u>Public hearing on sufficiency of textbooks and instructional materials</u>
Ed. Code 60200- 60206 <u>60213</u>	Elementary school materials
Ed. Code 60226	Requirements for publishers and manufacturers
Ed. Code 60400-60411	High school textbooks <u>and instructional materials</u>
Ed. Code 60510-60511	Donation or sale of obsolete instructional materials
Management Resources	Description
<u>California Department of Education Publication</u>	Selection of Instructional Materials; CIL: 90/91-02 <u>FAQ</u>
California Department of Education Publication	Standards for Evaluation of <u>Evaluating</u> Instructional Materials with Respect to <u>for</u> Social Content, 1986 <u>2013</u> edition; revised 2001

Website	CSBA District and County Office of Education Legal Services
Website	California Department of Education, Curriculum and Instruction Resources
Website	CSBA
Website	Department of Justice (https://oag.ca.gov/)
Website	U.S. Department of Education, Office for Civil Rights (https://www2.ed.gov/about/offices/list/ocr/index.html)

Cross References

Code	Description
0410	Nondiscrimination in District Programs and Activities
1100	Communication With The Public
1250	Visitors/Outsiders
1250	Visitors/Outsiders
1312.1	Complaints Concerning District Employees
1312.1	Complaints Concerning District Employees
1312.3	Uniform Complaint Procedures
1312.3	Uniform Complaint Procedures
1312.3-E(1)	Uniform Complaint Procedures
1312.3-E(2)	Uniform Complaint Procedures
1312.4	Williams Uniform Complaint Procedures
1312.4-E(1)	Williams Uniform Complaint Procedures
1312.4-E(2)	Williams Uniform Complaint Procedures
5145.3	Nondiscrimination/Harassment
6000	Concepts And Roles
6141	Curriculum Development And Evaluation
6141	Curriculum Development And Evaluation
6142.6	Visual And Performing Arts Education
6142.92	Mathematics Instruction
6142.94	History-Social Science Instruction
6143	Courses Of Study
6144	Controversial Issues
6161.1	Selection And Evaluation Of Instructional Materials
6161.1	Selection And Evaluation Of Instructional Materials

6161.1-E(1)	Selection And Evaluation Of Instructional Materials
6161.11	Supplementary Instructional Materials
6161.2	Damaged Or Lost Instructional Materials
6163.1	Library Media Centers
9000	Role Of The Board
9005	Governance Standards
9012	Board Member Electronic Communications
9200	Limits Of Board Member Authority
9322	Agenda/Meeting Materials

Exhibit 1312.2-E(1): Complaints Concerning Instructional Materials

Status: ADOPTED

Original Adopted Date: 12/01/1990 | **Last Revised Date:** 03/10/01/2006/2023 | **Last Reviewed Date:** 03/10/01/2006/2023

**REQUEST FOR RECONSIDERATION OF EXISTING
INSTRUCTIONAL MATERIALS**

This form is only for use ~~only~~ by district employees, district residents, or parents/guardians of children enrolled in a district school to challenge the content or use of an any existing textbook, instructional material, supplemental instructional materials, or other curriculum for classroom instruction, or any book or other resource in a school library. **For complaints regarding sufficiency of, supplemental instructional materials, please use the Williams Uniform Complaint Procedure complaint form.**

Date: _____

Name of person filing
complaint: _____

Anonymous complaints will not be accepted.

Group represented (if any): _____

Phone: _____

E-mail address, if any: _____

Address: _____

Instructional Material Being Challenged:

Title: _____

Author: _____

Publisher: _____

Date of Edition: _____

Name of school/classroom instructional material was
used: _____

1. 1. Please specifically state the nature of your concern or objection and identify your objection by page, ~~tap~~ website, webpage and/or link, recording or digital sequence, video frame, or words, as appropriate. You may use additional pages if necessary.

Did you _____

2. 2. Was the instructional material of concern read/view~~heard~~/viewed in isolation or was the entire selection?

3. For read/heard/viewed? If the entire selection was not read/heard/viewed, what age group would you recommend this material?

4. If not, what ~~is~~ your estimate regarding the percentage did you ~~of the amount~~ read/view, or what parts?
heard/viewed?

5. 3. What do you feel might be the result ~~is~~ your concern regarding the consequence if a student reads/hears/views ~~this~~ the instructional material?
In your assessment, is the instructional material appropriate for the age of the students being taught?

6. 4. What would you like the school to do about ~~this~~ the instructional material?

- Do not assign it to my child
- Withdraw it from all students
- Reconsider it

Signature of complainant

For District Use:

Request received by: _____

Date: _____

Title: _____

Action taken: _____

Date: _____

Date: _____

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State

[5 CCR 4600-4670](#)

Ed. Code 18111

[Ed. Code 220](#)

[Ed. Code 242](#)

[Ed. Code 243](#)

[Ed. Code 1240](#)

Ed. Code 35010

[Ed. Code 35160](#)

Ed. Code 35186

[Ed. Code 44805](#)

Description

[Uniform complaint procedures](#)

Exclusion of books by Governing board [that are sectarian, partisan, or denominational character](#)

[Prohibition of discrimination](#)

[Access to information about educational laws and policies regarding right to accurate and inclusive curriculum](#)

[Unlawful discrimination related to the use or prohibited use of textbooks and instructional materials](#)

[County superintendent of schools; duties](#)

Control of district; prescription and enforcement of rules

[Powers and duties of school boards](#)

Williams uniform complaint procedures

[Teacher enforcement of course of studies; use of textbooks, rules and regulations](#)

Ed. Code 44805	Enforcement of course of studies; use of textbooks, rules and regulations
Ed. Code 48907	Exercise of free expression; time, place and manner rules and regulations
Ed. Code 48950	Speech and other communication
Ed. Code 51204.5	Social sciences instruction; contributions of specified groups
Ed. Code 51501	Subject matter reflecting on race, color, etc. Nondiscriminatory subject matter
Ed. Code 51511	Religious matters properly included in courses of study
Ed. Code 51933	Sexual health education and HIV prevention materials
Ed. Code 60000-60005	Instructional materials; legislative intent
Ed. Code 60040- 60048 60052	Instructional requirements and materials Requirements for instructional materials
Ed. Code 60119	Public hearing on sufficiency of materials Public hearing on sufficiency of textbooks and instructional materials
Ed. Code 60200- 60206 60213	Elementary school materials
Ed. Code 60226	Requirements for publishers and manufacturers
Ed. Code 60400-60411	High school textbooks and instructional materials
Ed. Code 60510-60511	Donation or sale of obsolete instructional materials
Management Resources	Description
California Department of Education Publication	Selection of Instructional Materials; CIL: 90/91-02 FAQ
California Department of Education Publication	Standards for Evaluation of Evaluating Instructional Materials with Respect to for Social Content, 1986 2013 edition; revised 2001
Website	CSBA District and County Office of Education Legal Services
Website	California Department of Education, Curriculum and Instruction Resources
Website	CSBA
Website	Department of Justice (https://oag.ca.gov/)
Website	U.S. Department of Education, Office for Civil Rights (https://www2.ed.gov/about/offices/list/ocr/index.html)

Cross References

Code	Description
0410	Nondiscrimination in District Programs and Activities
1100	Communication With The Public
1250	Visitors/Outsiders

1250	Visitors/Outsiders
1312.1	Complaints Concerning District Employees
1312.1	Complaints Concerning District Employees
1312.3	Uniform Complaint Procedures
1312.3	Uniform Complaint Procedures
1312.3-E(1)	Uniform Complaint Procedures
1312.3-E(2)	Uniform Complaint Procedures
1312.4	Williams Uniform Complaint Procedures
1312.4-E(1)	Williams Uniform Complaint Procedures
1312.4-E(2)	Williams Uniform Complaint Procedures
<u>5145.3</u>	<u>Nondiscrimination/Harassment</u>
6000	Concepts And Roles
6141	Curriculum Development And Evaluation
6141	Curriculum Development And Evaluation
6142.6	Visual And Performing Arts Education
6142.92	Mathematics Instruction
6142.94	History-Social Science Instruction
<u>6143</u>	<u>Courses Of Study</u>
6144	Controversial Issues
6161.1	Selection And Evaluation Of Instructional Materials
6161.1	Selection And Evaluation Of Instructional Materials
6161.1-E(1)	Selection And Evaluation Of Instructional Materials
6161.11	Supplementary Instructional Materials
6161.2	Damaged Or Lost Instructional Materials
6163.1	Library Media Centers
9000	Role Of The Board
9005	Governance Standards
9012	Board Member Electronic Communications
9200	Limits Of Board Member Authority
9322	Agenda/Meeting Materials

Policy 1312.3: Uniform Complaint Procedures

Status: ADOPTED

Original Adopted Date: 05/01/2017 | **Last Revised Date:** ~~12/10/01/2021~~**2023** | **Last Reviewed Date:** ~~12/10/01/2021~~**2023**

CSBA NOTE: To address prohibited discrimination and violations of state and federal laws governing educational programs, 5 CCR 4621 **mandates** districts to adopt uniform complaint procedures (UCP) consistent with the state's complaint procedures specified in 5 CCR 4600-4670. Additionally, Education Code 52075 **mandates** districts to adopt policies and procedures implementing the use of UCP to investigate and resolve complaints alleging noncompliance with requirements related to the local control and accountability plan, and Education Code 8212, as ~~renumbered by AB 131 (Ch. 116, Statutes of 2021)~~ **mandates** districts to adopt policies and procedures for resolving complaints regarding specified health and safety issues in license-exempt California State Preschool Programs (CSPP). Furthermore, a number of federal civil rights statutes and their implementing regulations mandate districts to adopt policies and procedures for the prompt and equitable resolution of complaints of unlawful discrimination (such as discriminatory harassment, intimidation, or bullying). For example, districts are **mandated** pursuant to 28 CFR 35.107 to adopt policy and procedures to address discrimination on the basis of disability, while districts that receive federal financial assistance are **mandated** pursuant to 34 CFR 106.8 and 34 CFR 110.25 to adopt policies and procedures to address discrimination on the basis of sex and age. The following policy contains a list of programs and activities subject to these procedures pursuant to state law; see the section "Complaints Subject to UCP", below.

The California Department of Education (CDE) monitors district programs and operations for compliance with these requirements through its Federal Program Monitoring (FPM) process. The FPM consists of a review of (1) written district policies and procedures for required statements, including prohibition of discrimination (such as discriminatory harassment, intimidation, and bullying) against students pursuant to Education Code 234.1; and (2) records of required activities, such as annual notification provided to students, parents/guardians, employees, and other school community members.

The U.S. Department of Education's Office for Civil Rights (OCR) enforces federal anti-discrimination laws, including Title II of the Americans with Disabilities Act (42 USC 12101-12213), Title VI of the Civil Rights Act of 1964 (42 USC 2000d-~~2000e-17~~**2000d-7**), Title IX of the Education Amendments Act of 1972 (20 USC 1681-1688), Section 504 of the Rehabilitation Act of 1973 (29 USC 794), and the Age Discrimination Act of 1975 (42 USC 6101-6107). Whether a complaint of sexual harassment is addressed through the UCP or the federal Title IX complaint procedures adopted pursuant to 34 CFR 106.44-106.45, as ~~added by 85 Fed. Reg. 30026~~, is dependent on whether the alleged conduct meets the more stringent federal definition or the state definition of sexual harassment. See the section "Non-UCP Complaints" below, the accompanying administrative regulation, BP/AR 5145.7 - Sexual Harassment, and AR 5145.71 - Title IX Sexual Harassment Complaint Procedures.

The following policy and accompanying administrative regulation reflect all components required by law, 5 CCR 4600-4670, as amended by Register 2020, No. 21, and the ~~2021-22~~**2023-24** FPM instrument. Additional details provided herein may help districts during a compliance check by CDE or in the event that a CDE or OCR investigation occurs.

The Governing Board recognizes that the district has the primary responsibility to ensure compliance with applicable state and federal laws and regulations governing educational programs. The Board encourages the early resolution of complaints whenever possible. To resolve complaints which may require a more formal process, the Board adopts the uniform system of complaint processes specified in 5 CCR 4600-4670 and the accompanying administrative regulation.

Complaints Subject to UCP

CSBA NOTE: The FPM process includes a review of a district's policies and procedures to determine whether all district programs and activities that are subject to the UCP, as listed in the FPM instrument, are addressed. ~~Items #1-23~~ The 2023-24 FPM instrument does not include school safety plans, as was provided for in the 2022-23 instrument. Items #1-22 list all programs and activities identified in the FPM instrument. According to CDE, the district's policy must list all such programs and activities and, at the district's discretion, may add a paragraph below the list stating the UCP programs and activities that are implemented in the district.

For further information regarding requirements for the following programs and activities, see the law cited and/or related CSBA policy and/or administrative regulation.

The district's uniform complaint procedures (UCP) shall be used to investigate and resolve complaints regarding the following programs and activities:

1. Accommodations for pregnant and parenting students (Education Code 46015)
2. Adult education programs (Education Code 8500-8538, 52334.7, 52500-52617)
3. After School Education and Safety programs (Education Code 8482-8484.65)
4. Agricultural career technical education (Education Code 52460-52462)
5. Career technical and technical education and career technical and technical training programs (Education Code 52300-52462)
6. Child care and development programs (Education Code 8200-8488)
7. Compensatory education (Education Code 54400)
8. Consolidated categorical aid programs (Education Code 33315; 34 CFR 299.10-299.12)
9. Course periods without educational content (Education Code 51228.1-51228.3)
10. Discrimination, harassment, intimidation, or bullying in district programs and activities, including in those programs or activities funded directly by or that receive or benefit from any state financial assistance, based on a person's actual or perceived characteristics of race or ethnicity, color, ancestry, nationality, national origin, immigration status, ethnic group

identification, age, religion, marital status, pregnancy, parental status, physical or mental disability, medical condition, sex, sexual orientation, gender, gender identity, gender expression, or genetic information, or any other characteristic identified in Education Code 200 or 220, Government Code 11135, or Penal Code 422.55, or based on the person's association with a person or group with one or more of these actual or perceived characteristics (5 CCR 4610)

CSBA NOTE: Education Code 243, as added by AB 1078 (Ch. 229, Statutes of 2023), clarifies when it is unlawful discrimination for the Governing Board to (1) refuse to approve the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library or (2) prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library. The Board may not refuse to approve such use on the basis that the material includes a study of the role and contributions of specified individuals or groups, unless the study of the role and contributions reflects adversely upon legally protected groups. Additionally, the Board may not prohibit such use on the basis that the study of the role and contributions contain inclusive or diverse perspectives.

Complaints alleging discrimination based on a violation of Education Code 243, as added by AB 1078, may be brought under the district's UCP or may be filed directly with the Superintendent of Public Instruction (SPI). Complaints that are filed directly with the SPI are required to identify the basis for doing so, and present evidence that supports the basis for the direct filing. In such cases, the SPI may directly intervene without waiting for an investigation by the district. For more information regarding complaints concerning instructional materials, see BP/AR 1312.2 – Complaints Concerning Instructional Materials and AR 1312.4 – Williams Uniform Complaint Procedures.

Education Code 242, as added by AB 1078, requires CDE to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum.

Discrimination includes, but is not limited to, the Board's refusal to approve the use or prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or other resource in a school library, on the basis that it includes a study of the role and contributions of any individual or group consistent with the requirements of Education Code 51204.5 and 60040, unless such study would violate Education Code 51501 or 60044. A complaint alleging such unlawful discrimination may, in addition to or in lieu of being filed with the district, be directly filed with the Superintendent of Public Instruction (SPI). (Education Code 243)

11. Educational and graduation requirements for students in foster care, ~~homeless~~ students experiencing homelessness, students from military families, ~~and~~ students formerly in a juvenile court school, students who are migratory, and students participating in a newcomer program (Education Code 48645.7, 48853, 48853.5, 49069.5, 51225.1, 51225.2)
12. Every Student Succeeds Act (Education Code 52059.5; 20 USC 6301 et seq.)
13. Local control and accountability plan (Education Code 52075)

14. Migrant education (Education Code 54440-54445)

15. Physical education instructional minutes (Education Code 51210, 51222, 51223)

16. Student fees (Education Code 49010-49013)

17. Reasonable accommodations to a lactating student (Education Code 222)

18. Regional occupational centers and programs (Education Code 52300-52334.7)

19. School plans for student achievement as required for the consolidated application for specified federal and/or state categorical funding (Education Code 64001)

~~20. School safety plans (Education Code 32280-32289)~~

~~21.~~ 20. School site councils as required for the consolidated application for specified federal and/or state categorical funding (Education Code 65000)

~~22.~~ 21. State preschool programs (Education Code 8207-8225)

CSBA NOTE: Pursuant to Education Code 8212, as renumbered by AB 131, and CDE's ~~2021-22~~ 2023-24 FPM instrument, the district must use the UCP, with modifications as necessary, to resolve complaints alleging deficiencies related to health and safety issues in license-exempt CSPPs.

Pursuant to 5 CCR 4610, such complaints must be addressed through the procedures described in 5 CCR 4690-4694, as added by Register 2020, No. 21. See the section "Health and Safety Complaints in License-Exempt Preschool Programs" in the accompanying administrative regulations.

~~23.~~ 22. State preschool health and safety issues in license-exempt programs (Education Code 8212)

CSBA NOTE: 5 CCR 4621 mandates that district policy ensure that complainants are protected from retaliation as specified in item #~~24~~ 23 below.

~~24.~~ 23. Any complaint alleging retaliation against a complainant or other participant in the complaint process or anyone who has acted to uncover or report a violation subject to this policy

~~25.~~ 24. Any other state or federal educational program the Superintendent of Public Instruction SPI or designee deems appropriate

CSBA NOTE: 5 CCR 4631 authorizes the district to utilize alternative dispute resolution (ADR) methods, including mediation, to resolve complaints before initiating a formal investigation. However, the district should ensure that any ADR it uses, particularly "in-person ADR," is appropriate for the particular situation. For example, in some instances (e.g., sexual assault), face-to-face mediation should not be used, even if all parties voluntarily agree, given the risk that a student might feel pressured to "voluntarily" agree to it. Districts may not offer or facilitate an informal resolution process to resolve allegations that an employee sexually harassed a student; see AR 5145.71 - Title IX Sexual Harassment Complaint Procedures.

The following optional paragraph provides for a neutral mediator and should be revised to reflect district practice.

The Board recognizes that alternative dispute resolution (ADR) can, depending on the nature of the allegations, offer a process for resolving a complaint in a manner that is acceptable to all parties. An ADR process such as mediation may be offered to resolve complaints that involve more than one student and no adult. However, mediation shall not be offered or used to resolve any complaint involving sexual assault or where there is a reasonable risk that a party to the mediation would feel compelled to participate. The Superintendent or designee shall ensure that the use of ADR is consistent with state and federal laws and regulations.

CSBA NOTE: The following paragraph is mandated pursuant to 5 CCR 4621. Appropriate disclosure will vary in each case depending on the facts and circumstances.

The district shall protect all complainants from retaliation. In investigating complaints, the confidentiality of the parties involved shall be protected as required by law. For any complaint alleging retaliation or unlawful discrimination (such as discriminatory harassment, intimidation, or bullying), the Superintendent or designee shall keep the identity of the complainant, and/or the subject of the complaint if different from the complainant, confidential when appropriate and as long as the integrity of the complaint process is maintained.

When an allegation that is not subject to UCP is included in a UCP complaint, the district shall refer the non-UCP allegation to the appropriate staff or agency and shall investigate and, if appropriate, resolve the UCP-related allegation(s) through the district's UCP.

The Superintendent or designee shall provide training to district staff to ensure awareness and knowledge of current law and requirements related to UCP, including the steps and timelines specified in this policy and the accompanying administrative regulation.

CSBA NOTE: It is important to maintain records of all UCP complaints and the investigations of those complaints. If the district is investigated by OCR or CDE, these are important documents in demonstrating that the district has complied with federal law, state law, and its own policies and regulations.

The Superintendent or designee shall maintain a record of each complaint and subsequent related actions, including steps taken during the investigation and all information required for compliance with 5 CCR 4631 and 4633.

Non-UCP Complaints

The following complaints shall not be subject to the district's UCP but shall be investigated and resolved by the specified agency or through an alternative process:

1. Any complaint alleging child abuse or neglect shall be referred to the County Department of Social Services Protective Services Division or the appropriate law enforcement agency. (5

CCR 4611)

2. Any complaint alleging health and safety violations by a child development program shall, for licensed facilities, be referred to Department of Social Services. (5 CCR 4611)
3. Any complaint alleging that a student, while in an education program or activity in which the district exercises substantial control over the context and respondent, was subjected to sexual harassment as defined in 34 CFR 106.30 shall be addressed through the federal Title IX complaint procedures adopted pursuant to 34 CFR 106.44-106.45, as specified in [ARAdministrative Regulation](#) 5145.71 - Title IX Sexual Harassment Complaint Procedures.

CSBA NOTE: Complaints of employment discrimination are not subject to the UCP. Instead, pursuant to 2 CCR 11023, the district must establish an impartial and prompt process for addressing such complaints. In addition, 5 CCR 4611 requires that employment discrimination complaints be referred to the [Civil Rights](#) Department of Fair Employment and Housing. See AR 4030 - Nondiscrimination in Employment for applicable complaint procedures.

4. Any complaint alleging employment discrimination or harassment shall be investigated and resolved by the district in accordance with the procedures specified in [ARAdministrative Regulation](#) 4030 - Nondiscrimination in Employment, including the right to file the complaint with the California [Civil Rights](#) Department of Fair Employment and Housing.

CSBA NOTE: 5 CCR 4610, as amended by Register 2020, No. 21, limits the applicability of the UCP for complaints regarding special education and child nutrition, as provided in Items #5-7 below.

5. Any complaint alleging a violation of a state or federal law or regulation related to special education, a settlement agreement related to the provision of a free appropriate public education (FAPE), failure or refusal to implement a due process hearing order to which the district is subject, or a physical safety concern that interferes with the district's provision of FAPE shall be submitted to the California Department of Education (CDE) in accordance with [ARAdministrative Regulation](#) 6159.1 - Procedural Safeguards and Complaints for Special Education. (5 CCR 3200-3205)
6. Any complaint alleging noncompliance of the district's food service program with laws regarding meal counting and claiming, reimbursable meals, eligibility of children or adults, or use of cafeteria funds and allowable expenses shall be filed with or referred to CDE in accordance with ~~BP~~[Board Policy](#) 3555 - Nutrition Program Compliance. (5 CCR 15580-15584)
7. Any allegation of discrimination based on race, color, national origin, sex, age, or disability in the district's food service program shall be filed with or referred to the U.S. Department of Agriculture in accordance with ~~BP~~[Board Policy](#) 3555 - Nutrition Program Compliance. (5 CCR 15582)

CSBA NOTE: Education Code 35186 requires the district to use UCP, with modifications, to investigate and resolve complaints related to the issues stated in the following paragraph (i.e., "Williams complaints"). Because Education Code 35186 sets forth different timelines for investigation and resolution of these kinds of complaints than the timelines specified in law for

other uniform complaints, CDE has created a separate uniform complaint process for the Williams complaints. See AR 1312.4 - Williams Uniform Complaint Procedures for the separate procedure.

8. Any complaint related to sufficiency of textbooks or instructional materials, emergency or urgent facilities conditions that pose a threat to the health or safety of students or staff, or teacher vacancies and misassignments shall be investigated and resolved in accordance with [AR Administrative Regulation 1312.4 - Williams Uniform Complaint Procedures](#). (Education Code 35186)

Policy Reference UPDATE Service

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Policy Reference Disclaimer:

These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State	Description
2 CCR 11023	Harassment and discrimination prevention and correction
5 CCR 15580-15584	Child nutrition programs complaint procedures
5 CCR 3200-3205	Special education compliance complaints
5 CCR 4600-4670	Uniform complaint procedures
5 CCR 4600-4687	Uniform complaint procedures and Williams complaints
5 CCR 4690-4694	Complaints regarding health and safety issues in license-exempt preschool programs
5 CCR 4900-4965	Nondiscrimination in elementary and secondary educational programs receiving state or federal financial assistance
Ed. Code 18100-18203	School libraries
Ed. Code 200-262.4	Prohibition of discrimination
Ed. Code 32280-32289.5	School safety plans
Ed. Code 35186	Williams uniform complaint procedures
Ed. Code 46015	Parental leave for students
Ed. Code 48645.7	Juvenile court schools
Ed. Code 48853-48853.5	Foster youth
Ed. Code 48985	Notices to parents in language other than English
Ed. Code 49010-49013	Student fees
Ed. Code 49060-49079	Student records
Ed. Code 49069.5	Records of foster youth
Ed. Code 49490-49590	Child nutrition programs

Ed. Code 49701	Provisions of the Interstate Compact on Educational Opportunities for Military Children
<u>Ed. Code 51204.5</u>	<u>Social sciences instruction; contributions of specified groups</u>
Ed. Code 51210	Course of study for grades 1-6
Ed. Code 51222	Physical education
Ed. Code 51223	Physical education; elementary schools
Ed. Code 51225.1-51225.2	Foster youth, homeless children, former juvenile court school students; course credits; graduation requirements
Ed. Code 51226-51226.1	Career technical education
Ed. Code 51228.1-51228.3	Course periods without educational content
<u>Ed. Code 51501</u>	<u>Nondiscriminatory subject matter</u>
Ed. Code 52059.5	Statewide system of support
Ed. Code 52060-52077	Local control and accountability plan
Ed. Code 52075	Complaint for lack of compliance with local control and accountability plan requirements
Ed. Code 52300-52462	Career technical education
Ed. Code 52500-52617	Adult schools
Ed. Code 54400-54425	Compensatory education programs
Ed. Code 54440-54445	Migrant education
Ed. Code 54460-54529	Compensatory education programs
Ed. Code 59000-59300	Special schools and centers
<u>Ed. Code 60010</u>	<u>Instructional materials; definition</u>
<u>Ed. Code 60040-60052</u>	<u>Requirements for instructional materials</u>
Ed. Code 64000-64001	Consolidated application process; school plan for student achievement
Ed. Code 65000-65001	School site councils
Ed. Code 8200-8488	Child care and development programs
Ed. Code 8500-8538	Adult basic education
Gov. Code 11135	Prohibition of discrimination
Gov. Code 12900-12996	Fair Employment and Housing Act
H&S Code 1596.792	California Child Day Care Act; general provisions and definitions
H&S Code 1596.7925	California Child Day Care Act; health and safety regulations
Pen. Code 422.55	Definition of hate crime
Pen. Code 422.6	Crimes; harassment

Federal	Description
20 USC 1221	Application of laws
20 USC 1232g	Family Educational Rights and Privacy Act (FERPA) of 1974
20 USC 1681-1688	Title IX of the Education Amendments of 1972; discrimination based on sex
20 USC 6301-6576	Title I Improving the Academic Achievement of the Disadvantaged
20 USC 6801-7014	Title III language instruction for limited English proficient and immigrant students
28 CFR 35.107	Nondiscrimination on basis of disability; complaints
29 USC 794	Rehabilitation Act of 1973; Section 504
34 CFR 100.3	Prohibition of discrimination on basis of race, color or national origin
34 CFR 104.7	Section 504; Designation of responsible employee and adoption of grievances procedures
34 CFR 106.1-106.82	Nondiscrimination on the basis of sex in education programs
34 CFR 106.30	Discrimination on the basis of sex in education programs and activities; definitions
34 CFR 106.44	Recipient's response to sexual harassment
34 CFR 106.45	Grievance process for formal complaints of sexual harassment
34 CFR 106.8	Designation of coordinator; dissemination of policy, and adoption of grievance procedures
34 CFR 110.25	Notification of nondiscrimination on the basis of age
34 CFR 99.1-99.67	Family Educational Rights and Privacy
42 USC 11431-11435	McKinney-Vento Homeless Assistance Act
42 USC 12101-12213	Americans with Disabilities Act
42 USC 2000d-2000e-17 2000d-7	Title VI and Title VII Civil Rights Act of 1964, as amended
42 USC 2000h-2-2000h-6	Title IX of the Civil Rights Act of 1964
42 USC 6101-6107	Age Discrimination Act of 1975

Management Resources

	Description
California Department of Education Publication	Uniform Complaint Procedure 2021-22 Program Instrument
California Department of Education Publication	Sample UCP Board Policies and Procedures
U.S. DOE, Office for Civil Rights Publication	Part 1: Questions and Answers Regarding the Department's Title IX Regulations, January 2021
U.S. DOE, Office for Civil Rights Publication	Questions and Answers on the Title IX Regulations on Sexual Harassment, July 2021

U.S. DOE, Office for Civil Rights Publication	Dear Colleague Letter: Responding to Bullying of Students with Disabilities, October 2014
U.S. DOJ Publication	Guidance to Federal Financial Assistance Recipients Regarding Title VI Prohibition Against National Origin Discrimination Affecting Limited English Proficient Persons, 2007
Website	CSBA District and County Office of Education Legal Services
Website	Student Privacy Policy Office
Website	U.S. Department of Agriculture
Website	California Department of Social Services
Website	U.S. Department of Justice
Website	California Department of Education
Website	CSBA
Website	U.S. Department of Education, Office for Civil Rights
Website	California Civil Rights Department

Cross References

Code	Description
0410	Nondiscrimination In District Programs And Activities
0420	School Plans/Site Councils
0420	School Plans/Site Councils
0420.41	Charter School Oversight
0420.41-E(1)	Charter School Oversight
0430	Comprehensive Local Plan For Special Education
0430	Comprehensive Local Plan For Special Education
0450	Comprehensive Safety Plan
0450	Comprehensive Safety Plan
0460	Local Control And Accountability Plan
0460	Local Control And Accountability Plan
0470	COVID-19 Mitigation Plan
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1113	District And School Websites
1113	District And School Websites
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1114	District-Sponsored Social Media
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1340	Access To District Records
3260	Fees And Charges
3260	Fees And Charges
3555	Nutrition Program Compliance
3555-E(1)	Nutrition Program Compliance
3580	District Records
3580	District Records
4030	Nondiscrimination In Employment
4030	Nondiscrimination In Employment
4112.23	Special Education Staff
4112.9	Employee Notifications
4112.9-E(1)	Employee Notifications
4118	Dismissal/Suspension/Disciplinary Action
4118	Dismissal/Suspension/Disciplinary Action
4119.1	Civil And Legal Rights
4119.11	Sexual Harassment
4119.11	Sexual Harassment
4119.23	Unauthorized Release Of Confidential/Privileged Information

4131	Staff Development
4212.9	Employee Notifications
4212.9-E(1)	Employee Notifications
4218	Dismissal/Suspension/Disciplinary Action
4218	Dismissal/Suspension/Disciplinary Action
4219.1	Civil And Legal Rights
4219.11	Sexual Harassment
4219.11	Sexual Harassment
4219.23	Unauthorized Release Of Confidential/Privileged Information
4231	Staff Development
4244	Complaints
4244	Complaints
4312.9	Employee Notifications
4312.9-E(1)	Employee Notifications
4319.1	Civil And Legal Rights
4319.11	Sexual Harassment
4319.11	Sexual Harassment
4319.23	Unauthorized Release Of Confidential/Privileged Information
4331	Staff Development
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4344	Complaints
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5141.4	Child Abuse Prevention And Reporting

5141.4	Child Abuse Prevention And Reporting
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6159	Individualized Education Program

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6159.3	Appointment Of Surrogate Parent For Special Education Students
6159.3	Appointment Of Surrogate Parent For Special Education Students
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6164.2	Guidance/Counseling Services
6164.4	Identification And Evaluation Of Individuals For Special Education
6164.4	Identification And Evaluation Of Individuals For Special Education
6164.5	Student Success Teams
6164.5	Student Success Teams
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6171	Title I Programs
6173	Education For Homeless Children
6173	Education For Homeless Children
6173-E(1)	Education For Homeless Children
6173-E(2)	Education For Homeless Children
6173.1	Education For Foster Youth
6173.1	Education For Foster Youth
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6173.2	Education Of Children Of Military Families
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Regulation 1312.3: Uniform Complaint Procedures

Status: ADOPTED

Original Adopted Date: 05/01/2017 | **Last Revised Date:** 12/10/01/2024/2023 | **Last Reviewed Date:** 12/10/01/2024/2023

CSBA NOTE: 5 CCR 4621 **mandates** that the district's uniform complaint procedures (UCP) be consistent with the procedures of 5 CCR 4600-4670. Additionally, Education Code 52075 **mandates** districts to adopt policies and procedures implementing the use of UCP to investigate and resolve complaints alleging noncompliance with requirements related to the local control and accountability plan (LCAP), and Education Code 8212, as renumbered by AB 131 (Ch. 116, Statutes of 2021) **mandates** districts to adopt policies and procedures for resolving complaints regarding specified health and safety issues in license-exempt California State Preschool Programs (CSPP). Furthermore, a number of federal civil rights statutes and their implementing regulations **mandate** districts to adopt policies and procedures for the prompt and equitable resolution of complaints of unlawful discrimination, harassment, intimidation, or bullying. For example, all districts are **mandated** pursuant to 28 CFR 35.107 to adopt policy and procedures to address discrimination on the basis of disability, while districts that receive federal financial assistance are **mandated** pursuant to 34 CFR 106.8 and 34 CFR 110.25 to adopt policies and procedures to address discrimination on the basis of sex and age. Some of the factors considered by the U.S. Department of Education's Office for Civil Rights (OCR) when determining whether a district's procedures are "prompt and equitable" are addressed throughout the following administrative regulation.

Education Code 243, as added by AB 1078 (Ch. 229, Statutes of 2023), clarifies when it is unlawful discrimination for the Governing Board to (1) refuse to approve the use any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library or (2) prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library. The Board may not refuse to approve such use on the basis that the material includes a study of the role and contributions of specified individuals or groups, unless the study of the role and contributions reflects adversely upon legally protected groups. Additionally, the Board may not prohibit such use on the basis that the study of the role and contributions contain inclusive or diverse perspectives.

Complaints alleging discrimination based on a violation of Education Code 243, as added by AB 1078, may be brought under the district's UCP or may be filed directly with the Superintendent of Public Instruction (SPI). Complaints that are filed directly with the SPI are required to identify the basis for doing so, and present evidence that supports the basis for the direct filing. In such cases, the SPI may directly intervene without waiting for an investigation by the district. For more information regarding complaints concerning instructional materials, see BP/AR 1312.2 – Complaints Concerning Instructional Materials and AR 1312.4 – Williams Uniform Complaint Procedures.

Education Code 242, as added by AB 1078, requires the California Department of Education (CDE) to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum.

Apart from these mandates, state law authorizes the use of UCP to resolve complaints of noncompliance with laws related to the development of a school plan for student achievement and the establishment of school site councils; accommodations for pregnant and parenting students; prohibition against the charging of student fees; educational rights of foster youth, ~~homeless~~ students experiencing homelessness, former juvenile court school students, children of military families, ~~migrant~~ students who are migratory, and students participating in a newcomer program for newly arrived immigrants; assignment of students to courses without educational content; and physical education instructional minutes. See the section "Complaints Subject to UCP" in the accompanying Board policy.

Except as may otherwise be specifically provided in other district policies, these uniform complaint procedures (UCP) shall be used to investigate and resolve only the complaints specified in the accompanying Board policy.

Compliance Officers

CSBA NOTE: 5 CCR 4621 **mandates** the district to identify in its policies and procedures the person(s), position(s), or unit(s) responsible for ensuring compliance with applicable state and federal laws and regulations governing educational programs, including the receiving and investigating of complaints alleging unlawful discrimination, harassment, intimidation, or bullying and retaliation. During its Federal Program Monitoring (FPM) process, ~~California Department of Education (CDE)~~ CDE staff will check to ensure that the district's procedures list the specific title(s) of the employee(s) responsible for receiving and investigating complaints. Districts should identify the specific title(s) of the compliance officer(s) in the space provided below. If a district identifies multiple compliance officers, it is recommended that one be designated the lead compliance officer.

The following paragraph specifies that the compliance officer will be the same person designated to serve as the Title IX Coordinator for addressing complaints of sexual harassment pursuant to AR 5145.7 - Sexual Harassment and AR 5145.71 - Title IX Sexual Harassment Complaint Procedures. Districts may modify this regulation to designate different district employees to serve these functions.

The district designates the individual(s), position(s), or unit(s) identified below as responsible for receiving, coordinating, and investigating complaints and for complying with state and federal civil rights laws. The individual(s), position(s), or unit(s) also serve as the compliance officer(s) specified in AR Administrative Regulation 5145.3 - Nondiscrimination/Harassment responsible for handling complaints regarding unlawful discrimination, harassment, intimidation, or bullying and in AR Administrative Regulation 5145.7 - Sexual Harassment for handling complaints regarding sexual harassment.

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CSBA NOTE: The following paragraph is for use by districts that have designated more than one compliance officer.

The compliance officer who receives a complaint may assign another compliance officer to investigate and resolve the complaint. The compliance officer shall promptly notify the complainant and respondent if another compliance officer is assigned to the complaint.

In no instance shall a compliance officer be assigned to a complaint in which the compliance officer has a bias or conflict of interest that would prohibit the fair investigation or resolution of the complaint. Any complaint against a compliance officer or that raises a concern about the compliance officer's ability to investigate the complaint fairly and without bias shall be filed with the Superintendent or designee who shall determine how the complaint will be investigated.

CSBA NOTE: 5 CCR 4621 **mandates** that the district's policy requires employees responsible for compliance and/or for investigating and resolving complaints to be knowledgeable about the laws and programs at issue in the complaints they are assigned. Compliance officers must also have training or experience in handling discrimination complaints, including appropriate investigative techniques and understanding of the applicable legal standards.

The Superintendent or designee shall ensure that employees assigned to investigate and resolve complaints receive training and are knowledgeable about the laws and programs at issue in the complaints to which they are assigned. Training provided to such employees shall cover current state and federal laws and regulations governing the program; applicable processes for investigating and resolving complaints, including those alleging unlawful discrimination, harassment, intimidation, or bullying; applicable standards for reaching decisions on complaints; and appropriate corrective measures. Assigned employees may have access to legal counsel as determined by the Superintendent or designee.

The compliance officer or, if necessary, an appropriate administrator shall determine whether interim measures are necessary during an investigation and while the result is pending. If interim measures are determined to be necessary, the compliance officer or the administrator shall consult with the Superintendent, the Superintendent's designee, or, if appropriate, the site principal to implement one or more interim measures. The interim measures shall remain in place until the compliance officer determines that they are no longer necessary or until the district issues its final written decision, whichever occurs first.

Notifications

The district's UCP policy and administrative regulation shall be posted in all district schools and offices, including staff lounges and student government meeting rooms. (Education Code 234.1)

CSBA NOTE: During the FPM process, CDE staff will check to ensure that the district's policy contains a statement ensuring annual dissemination of notice of the district's UCP to the persons specified below.

In addition, the Superintendent or designee shall annually provide written notification of the district's UCP to students, employees, parents/guardians of district students, district advisory committee members, school advisory committee members, appropriate private school officials or representatives, and other interested parties. (5 CCR 4622)

CSBA NOTE: 5 CCR 4622 requires the district to include specified information in its annual UCP notice to students, parents/guardians, employees, and others. The following list reflects those required components and additional content of the notice listed in CDE's FPM instrument.

A sample of the annual notice is available through CDE's ~~web site~~ [website](#). It is the district's responsibility to update the notice as necessary to reflect new law.

The notice shall include:

1. A statement that the district is primarily responsible for compliance with federal and state laws and regulations, including those related to prohibition of unlawful discrimination, harassment, intimidation, or bullying against any protected group, and a list of all programs and activities that are subject to UCP as identified in the section "Complaints Subject to UCP" in the accompanying Board policy
2. The title of the position responsible for processing complaints, the identity of the person(s) currently occupying that position if known, and a statement that such persons will be knowledgeable about the laws and programs that they are assigned to investigate
3. A statement that a UCP complaint, except a complaint alleging unlawful discrimination, harassment, intimidation, or bullying, must be filed no later than one year from the date the alleged violation occurred
4. A statement that a UCP complaint alleging unlawful discrimination, harassment, intimidation, or bullying must be filed no later than six months from the date of the alleged conduct or the date the complainant first obtained knowledge of the facts of the alleged conduct
5. A statement that a student enrolled in a public school shall not be required to pay a fee for participation in an educational activity that constitutes an integral fundamental part of the district's educational program, including curricular and extracurricular activities
6. A statement that a complaint regarding student fees or the local control and accountability plan (LCAP) may be filed anonymously if the complainant provides evidence or information leading to evidence to support the complaint
7. A statement that the district will post a standardized notice of the educational and graduation requirements of foster youth, ~~homeless~~ students [experiencing homelessness](#), children of military families, ~~and~~ former juvenile court school students now enrolled in the district, [students who are migratory, and students participating in a newcomer program](#) as specified in Education Code 48645.7, 48853, 48853.5, 49069.5, 51225.1, and 51225.2, and the complaint process
8. A statement that complaints will be investigated in accordance with the district's UCP and a written decision will be sent to the complainant within 60 days from the receipt of the complaint, unless this time period is extended by written agreement of the complainant
9. A statement that, for programs within the scope of the UCP as specified in the accompanying Board policy, the complainant has a right to appeal the district's investigation report to the California Department of Education (CDE) by filing a written appeal, including a copy of the original complaint and the district's decision, within 30 calendar days of receiving the district's decision
10. A statement advising the complainant of any civil law remedies, including, but not limited to, injunctions, restraining orders, or other remedies or orders that may be available under state or federal laws prohibiting discrimination, harassment, intimidation, or bullying, if applicable
11. A statement that copies of the district's UCP are available free of charge

CSBA NOTE: The following paragraph may be modified to reflect district practice. Pursuant to Education Code 221.61, a district and district school are required to post information related to Title IX on their ~~web sites~~websites, including specified information about complaint procedures under Title IX. See AR 5145.3 - Nondiscrimination/Harassment. A school or district that does not maintain a ~~web site~~website may comply by posting the information on the ~~web site~~website of its district or county office of education (COE), however a school, district, or COE is not required to establish a ~~web site~~website if it does not maintain one. A comprehensive list of rights based on the provisions of the federal regulations implementing Title IX can be found in Education Code 221.8

The annual notification, complete contact information of the compliance officer(s), and information related to Title IX as required pursuant to Education Code 221.6 shall be posted on the district and district school ~~web sites~~websites and may be provided through district-supported social media, if available.

CSBA NOTE: Both federal and state laws contain requirements for translation of certain information and documents. Title VI of the Civil Rights Act of 1964 requires districts to ensure meaningful access to their programs and activities by persons with limited English proficiency. OCR has interpreted this to require that, whenever information is provided to parents/guardians, districts must notify limited-English-proficient (LEP) parents/guardians in a language other than English in order to be adequate. OCR enforces this requirement consistent with the Department of Justice's "2007 Guidance to Federal Financial Assistance Recipients Regarding Title VI Prohibition Against National Origin Discrimination Affecting Limited English Proficient Persons." Under the Guidance, a recipient of federal funds has an obligation to provide language assistance to LEP individuals based on the balancing of four factors: (1) the number or proportion of LEP individuals likely to encounter the program, (2) the frequency with which LEP individuals come in contact with the program, (3) the nature and importance of the services provided by the program, and (4) the resources available to the recipient. State law is more specific than federal law: Education Code 48985 requires translation of certain information and documents if 15 percent or more of students enrolled in the school speak a single primary language other than English.

The Superintendent or designee shall ensure that all students and parents/guardians, including students and parents/guardians with limited English proficiency, have access to the relevant information provided in the district's policy, regulation, forms, and notices concerning the UCP.

If 15 percent or more of students enrolled in a particular district school speak a single primary language other than English, the district's UCP policy, regulation, forms, and notices shall be translated into that language, in accordance with Education Code 234.1 and 48985. In all other instances, the district shall ensure meaningful access to all relevant UCP information for parents/guardians with limited English proficiency.

Filing of Complaints

CSBA NOTE: Complaints filed under UCP may be filed directly with a compliance officer or with any site administrator not designated as a compliance officer. For example, acts of unlawful discrimination, harassment, intimidation, or bullying may initially be reported to a principal. See AR 5145.3 - Nondiscrimination/Harassment and AR 5145.7 - Sexual Harassment. If a site administrator not designated as a compliance officer receives a UCP complaint, the site administrator must notify a compliance officer. A district may also establish a site-level process for receiving informal reports about incidents for which a UCP complaint may be filed and notifying students and parents/guardians of their right to file a UCP complaint. Any site-level process established by a district should be in writing and distributed in the same manner as the grievance procedures listed herein with an explanation of how it interacts with the UCP complaint process.

The complaint shall be presented to the compliance officer who shall maintain a log of complaints received, providing each with a code number and a date stamp. If a site administrator not designated as a compliance officer receives a complaint, the site administrator shall notify the compliance officer.

All complaints shall be filed in writing and signed by the complainant. If a complainant is unable to put a complaint in writing due to conditions such as a disability or illiteracy, district staff shall assist in the filing of the complaint. (5 CCR 4600)

Complaints shall also be filed in accordance with the following rules, as applicable:

1. A complaint alleging district violation of applicable state or federal law or regulations governing the programs specified in the accompanying Board policy may be filed by any individual, public agency, or organization. (5 CCR 4600)

CSBA NOTE: Education Code 49013 and 52075 **mandate** districts to adopt procedures that allow for anonymous complaints to be filed when a district allegedly violates the prohibition against the charging of student fees or violates any requirement related to the LCAP.

2. Any complaint alleging noncompliance with law regarding the prohibition against student fees, deposits, and charges or any requirement related to the LCAP may be filed anonymously if the complaint provides evidence, or information leading to evidence, to support an allegation of noncompliance. A complaint about a violation of the prohibition against the charging of unlawful student fees may be filed with the principal of the school or with the Superintendent or designee.

CSBA NOTE: Pursuant to 5 CCR 4630, complaints related to the LCAP must be filed within a year of the date that the County Superintendent of Schools, the reviewing authority for districts, approves the district's LCAP.

3. A UCP complaint, except for a UCP complaint alleging unlawful discrimination, harassment, intimidation, or bullying, shall be filed no later than one year from the date the alleged violation occurred. For complaints related to the LCAP, the date of the alleged violation is the date when the County Superintendent of Schools approves the LCAP that was adopted by the Governing Board. (5 CCR 4630)
4. A complaint alleging unlawful discrimination, harassment, intimidation, or bullying may be filed only by a person who alleges having personally suffered unlawful discrimination, a person who believes that any specific class of individuals has been subjected to unlawful discrimination, or a duly authorized representative who alleges that an individual student has been subjected to discrimination, harassment, intimidation, or bullying. (5 CCR 4630)
5. A complaint alleging unlawful discrimination, harassment, intimidation, or bullying shall be initiated no later than six months from the date that the alleged unlawful discrimination occurred, or six months from the date that the complainant first obtained knowledge of the facts of the alleged unlawful discrimination. The time for filing may be extended for up to 90 days by the Superintendent or designee for good cause upon written request by the complainant setting forth the reasons for the extension. (5 CCR 4630)
6. When a complaint alleging unlawful discrimination, harassment, intimidation, or bullying is filed anonymously, the compliance officer shall pursue an investigation or other response as appropriate, depending on the specificity and reliability of the information provided and the seriousness of the allegation.

CSBA NOTE: Districts should consult [CSBA's District and County Office of Education Legal Services or district](#) legal counsel before honoring a confidentiality request to withhold the victim's name from the alleged perpetrator, especially in the case of alleged sexual assault, as this may affect the district's ability to conduct a thorough investigation or provide supportive measures to the victim. In OCR's ["Part 1: Questions and Answers Regarding the Department's Title IX Regulations,"](#) it is stated that, "Title IX regulations balance a complainant's desire for confidentiality (in terms of, for instance, the complainant's identity not being disclosed to the respondent) with a school's discretion to pursue an investigation where factual circumstances warrant an investigation even though the complainant does not desire to file a formal complaint or participate in a grievance process."

These guiding principles would also apply to harassment on the basis of race, gender, disability, or other protected characteristic.

7. When a complainant of unlawful discrimination, harassment, intimidation, or bullying or the alleged victim, when not the complainant, requests confidentiality, the compliance officer shall inform the complainant or victim that the request may limit the district's ability to investigate the conduct or take other necessary action. When honoring a request for confidentiality, the district shall nevertheless take all reasonable steps to investigate and resolve/respond to the complaint consistent with the request.

Mediation

CSBA NOTE: The following section should be used only by those districts that have decided to establish procedures for attempting to resolve complaints through alternative dispute resolution (ADR) procedures such as mediation; see the accompanying Board policy. The following section may be modified to specify the ADR method and timelines used within the district.

Districts may not offer or facilitate an informal resolution process to resolve allegations that an employee sexually harassed a student; see AR 5145.71 - Title IX Sexual Harassment Complaint Procedures.

Within three business days after receiving the complaint, the compliance officer may informally discuss with all the parties the possibility of using mediation to resolve the complaint. Mediation shall be offered to resolve complaints that involve more than one student and no adult. However, mediation shall not be offered or used to resolve any complaint involving an allegation of sexual assault or where there is a reasonable risk that a party to the mediation would feel compelled to participate. If the parties agree to mediation, the compliance officer shall make all arrangements for this process.

Before initiating the mediation of a complaint alleging retaliation or unlawful discrimination, harassment, intimidation, or bullying, the compliance officer shall ensure that all parties agree to permit the mediator access to all relevant confidential information. The compliance officer shall also notify all parties of the right to end the informal process at any time.

If the mediation process does not resolve the problem within the parameters of law, the compliance officer shall proceed with an investigation of the complaint.

The use of mediation shall not extend the district's timelines for investigating and resolving the complaint unless the complainant agrees in writing to such an extension of time. If mediation is successful and the complaint is withdrawn, then the district shall take only the actions agreed upon through the mediation. If mediation is unsuccessful, the district shall then continue with subsequent steps specified in this administrative regulation.

Investigation of Complaint

CSBA NOTE: 5 CCR 4631, which requires the district to provide the complainant with the opportunity to present relevant information, does not provide any timeline. Thus, the timeline specified below may be modified to reflect district practice.

Within 10 business days after the compliance officer receives the complaint, the compliance officer shall begin an investigation into the complaint within 10 business days of receiving the complaint.

Within one business day of initiating the investigation, the compliance officer shall provide the complainant and/or the complainant's representative with the opportunity to present the information contained in the complaint to the compliance officer and shall notify the complainant and/or representative of the opportunity to present the compliance officer with any evidence, or information leading to evidence, to support the allegations in the complaint. Such evidence or information may be presented at any time during the investigation.

CSBA NOTE: During the investigation, the compliance officer should consider all relevant circumstances, such as how the alleged misconduct affected one or more students' education; the type, frequency, and duration of the misconduct; the identity, age, and sex of the individuals involved in and impacted by the conduct and the relationship between them; the number of persons engaged in the conduct and at whom the conduct was directed; the size of the school, location of the incidents, and context in which they occurred; and other incidents at the school involving different individuals.

In conducting the investigation, the compliance officer shall collect all available documents and review all available records, notes, or statements related to the complaint, including any additional evidence or information received from the parties during the course of the investigation. The compliance officer shall individually interview all available witnesses with information pertinent to the complaint, and may visit any reasonably accessible location where the relevant actions are alleged to have taken place. At appropriate intervals, the compliance officer shall inform the parties of the status of the investigation.

To investigate a complaint alleging retaliation or unlawful discrimination, harassment, intimidation, or bullying, the compliance officer shall interview the alleged victim(s), any alleged offender(s), and other relevant witnesses privately, separately, and in a confidential manner. As necessary, additional staff or legal counsel may conduct or support the investigation.

CSBA NOTE: 5 CCR 4631 allows the district to dismiss a complaint when the complainant refuses to provide the investigator with relevant documents or otherwise obstructs the investigation. 5 CCR 4631 also provides that, if the district refuses to provide the investigator with access to records or other documents, the investigator may issue a finding in favor of the complainant. During the FPM process, CDE staff will check to ensure that both of these statements regarding the provision of access to information are included in the district's policy or procedures, as specified below.

A complainant's refusal to provide the district's investigator with documents or other evidence related to the allegations in the complaint, failure or refusal to cooperate in the investigation, or any other obstruction of the investigation may result in the dismissal of the complaint because of a lack of evidence to support the allegation. Refusal by the district to provide the investigator with access to records and/or information related to the allegations in the complaint, failure or refusal to cooperate in the investigation, or any other obstruction of the investigation may result in a finding based on evidence collected that a violation has occurred and in the imposition of a remedy in favor

of the complainant. (5 CCR 4631)

Timeline for Investigation Report

CSBA NOTE: Pursuant to 5 CCR 4631, the district's investigation report must be sent to the complainant within 60 calendar days of receiving the complaint. Option 1 below is for districts that do not allow complainants to appeal the compliance officer's decision to the ~~Governing~~ Board. Option 2 is for districts that allow appeals to the Board, and it requires the compliance officer's decision within 30 calendar days so that the Board's decision can still be given within the 60-day time limit.

Pursuant to 5 CCR 4631, only a complainant has the right to receive the investigation report and to file a complaint with the Board if dissatisfied with the compliance officer's decision. However, under certain circumstances, some of the same rights should be extended to a respondent in order to make the process equitable. For example, since the respondent to a complaint alleging unlawful discrimination, harassment, intimidation, or bullying is usually an individual, the respondent should be notified when the complainant has agreed to an extension of timelines. Options 1 and 2 reflect these recommendations and may be modified to reflect district practice. When questions arise as to what rights to provide to a respondent, the district should consult [CSBA's District and County Office of Education Legal Services or district](#) legal counsel accordingly.

Pursuant to 5 CCR 4640, when a UCP complaint is erroneously sent to CDE without first being filed with the district, the 60-day period specified in 5 CCR 4631 begins when the district receives the complaint.

Unless extended by written agreement with the complainant, the investigation report shall be sent to the complainant within 60 calendar days of the district's receipt of the complaint.

Within 30 calendar days of receiving the complaint, the compliance officer shall prepare and send to the complainant a written report, as described in the section "Investigation Report" below. If the complainant is dissatisfied with the compliance officer's decision, the complainant may, within five business days, file the complaint in writing with the Board.

The Board may consider the matter at its next regular Board meeting or at a special Board meeting convened in order to meet the 60-day time limit within which the complaint must be answered. When required by law, the matter shall be considered in closed session. The Board may decide not to hear the complaint, in which case the compliance officer's decision shall be final.

If the Board hears the complaint, the compliance officer shall send the Board's decision to the

complainant within 60 calendar days of the district's initial receipt of the complaint or within the time period that has been specified in a written agreement with the complainant. (5 CCR 4631)

For any complaint alleging unlawful discrimination, harassment, intimidation, and/or bullying, the respondent shall be informed of any extension of the timeline agreed to by the complainant, and, in the same manner as the complainant, may file a complaint with the Board if dissatisfied with the decision.

Investigation Report

CSBA NOTE: 5 CCR 4631 specifies components that are required to be part of the district's investigation report. Inclusion of these items will help protect the district's position in case of an appeal to CDE, a complaint submitted to OCR, or if litigation is filed.

For all complaints, the district's investigation report shall include: (5 CCR 4631)

1. The findings of fact based on the evidence gathered
2. A conclusion providing a clear determination for each allegation as to whether the district is in compliance with the relevant law
3. Corrective action(s) whenever the district finds merit in the complaint, including, when required by law, a remedy to all affected students and parents/guardians and, for a student fees complaint, a remedy that complies with Education Code 49013 and 5 CCR 4600
4. Notice of the complainant's right to appeal the district's investigation report to CDE, except when the district has used the UCP to address a complaint not specified in 5 CCR 4610
5. Procedures to be followed for initiating an appeal to CDE

The investigation report may also include follow-up procedures to prevent recurrence or retaliation and for reporting any subsequent problems.

CSBA NOTE: The Family Educational Rights and Privacy Act (FERPA) (20 USC 1232g; 34 CFR 99.1-99.67) protects student privacy, including student records containing details of the actions taken in response to a UCP complaint. However, pursuant to 20 USC 1221, FERPA may not "be construed to affect the applicability of Title VI of the Civil Rights Act of 1964, Title IX of Education Amendments of 1972, Title V of the Rehabilitation Act of 1973, the Age Discrimination Act, or other statutes prohibiting discrimination, to any applicable program." In February 2015, the Family Policy Compliance Office (FPCO), now the Student Privacy Policy Office, released a letter concluding that FERPA permits a district to disclose to a student who was subjected to unlawful discrimination certain information about the sanctions imposed upon the respondent when the sanctions directly relate to that student. Thus, if properly remedying the impact of discrimination would require disclosing to the alleged victim certain information on how the district disciplined the respondent (e.g., an order that the respondent stay away from the alleged victim), FPCO interprets FERPA as allowing the district to disclose that information.

Given the potential liability from improperly disclosing such information, districts are advised to consult with [CSBA's District and County Office of Education Legal Services](#) or district legal counsel when presented with a situation where a victim of unlawful discrimination requests information about sanctions imposed upon the respondent.

In consultation with district legal counsel, information about the relevant part of an investigation report may be communicated to a victim who is not the complainant and to other parties who may be involved in implementing the investigation report or are affected by the complaint, as long as the privacy of the parties is protected. In a complaint alleging unlawful discrimination, harassment, intimidation, ~~and~~or bullying, notice of the investigation report to the alleged victim shall include information about any sanction to be imposed upon the respondent that relates directly to the alleged victim.

CSBA NOTE: Education Code 48985 requires that reports sent to parents/guardians be written in their primary language when 15 percent or more of a school's enrolled students speak a single primary language other than English. During the FPM process, CDE staff will check to ensure that UCP complaint procedures pertaining to CSPP health and safety issues include a statement that the district response and the investigation report must, whenever Education Code 48985 is applicable, be written in English and the primary language in which the complaint was filed; see the section "Health and Safety Complaints in License-Exempt Preschool Programs" below. The following paragraph extends this provision to all types of complaints to ensure compliance with Education Code 48985. In addition, based on Title VI of the Civil Rights Act of 1964, OCR requires districts to ensure meaningful access to all relevant UCP information for parents/guardians with limited English proficiency.

If the complaint involves a limited-English-proficient (LEP) student or parent/guardian, then the district's response, if requested by the complainant, and the investigation report shall be written in English and the primary language in which the complaint was filed.

CSBA NOTE: During the FPM process, CDE staff will expect to see a statement detailing a complainant's right to pursue civil law remedies (i.e., action in a court of law) in addition to or in conjunction with the right to pursue administrative remedies from CDE.

For complaints alleging unlawful discrimination, harassment, intimidation, ~~and~~or bullying based on state law, the investigation report shall also include a notice to the complainant that:

1. The complainant may pursue available civil law remedies outside of the district's complaint procedures, including, but not limited to, injunctions, restraining orders or other remedies or orders, 60 calendar days after the filing of an appeal with CDE: (Education Code 262.3)
2. The 60 days moratorium does not apply to complaints seeking injunctive relief in state courts or to discrimination complaints based on federal law: (Education Code 262.3)
3. Complaints alleging discrimination based on race, color, national origin, sex, gender, disability, or age may also be filed with the U.S. Department of Education, Office for Civil Rights at www.ed.gov/ocr within 180 days of the alleged discrimination:

Corrective Actions

CSBA NOTE: The following section may be revised to reflect district practice.

When a complaint is found to have merit, the compliance officer shall adopt any appropriate corrective action permitted by law. Appropriate corrective actions that focus on the larger school or district environment may include, but are not limited to, actions to reinforce district policies; training for faculty, staff, and students; updates to school policies; or school climate surveys.

For complaints involving retaliation or unlawful discrimination, harassment, intimidation, or bullying, appropriate remedies that may be offered to the victim but not communicated to the respondent may include, but are not limited to, the following:

1. Counseling
2. Academic support
3. Health services
4. Assignment of an escort to allow the victim to move safely about campus
5. Information regarding available resources and how to report similar incidents or retaliation
6. Separation of the victim from any other individuals involved, provided the separation does not penalize the victim
7. Restorative justice
8. Follow-up inquiries to ensure that the conduct has stopped and there has been no retaliation

For complaints of retaliation or unlawful discrimination, harassment, intimidation, or bullying involving a student as the respondent, appropriate corrective actions that may be provided to the student include, but are not limited to, the following:

1. Transfer from a class or school as permitted by law
2. Parent/guardian conference
3. Education regarding the impact of the conduct on others
4. Positive behavior support
5. Referral to a student success team
6. Denial of participation in extracurricular or cocurricular activities or other privileges as permitted by law
7. Disciplinary action, such as suspension or expulsion, as permitted by law

When an employee is found to have committed retaliation or unlawful discrimination, harassment, intimidation, or bullying, the district shall take appropriate disciplinary action, up to and including dismissal, in accordance with applicable law and collective bargaining agreement.

The district may also consider training and other interventions for the larger school community to ensure that students, staff, and parents/guardians understand the types of behavior that constitute unlawful discrimination, harassment, intimidation, or bullying, that the district does not tolerate it, and how to report and respond to it.

CSBA NOTE: Generally, when a complaint is found to have merit, an appropriate remedy is provided to the complainant or other affected person. However, in certain instances, the law may require a remedy to be provided to all affected persons, not just the complainant or subject of the complaint. For example, pursuant to Education Code 49013 and 5 CCR 4600, if the district, or CDE on appeal, finds merit in the complaint alleging noncompliance with the law regarding student fees and charges, the district is required to provide a remedy to all affected students and parents/guardians, as specified below. The same requirement applies to allegations of noncompliance with required instructional minutes for physical education pursuant to Education

Code 51222 and 51223, course periods without educational content pursuant to Education Code 51228.3, and the LCAP requirements pursuant to Education Code 52075. Districts that do not maintain elementary schools should delete the reference to physical education below.

When a complaint is found to have merit, an appropriate remedy shall be provided to the complainant or other affected person.

However, if a complaint alleging noncompliance with the law regarding student fees, deposits, and other charges, physical education instructional minutes, courses without educational content, or any requirement related to the LCAP is found to have merit, the district shall provide a remedy to all affected students and parents/guardians subject to procedures established by regulation of the State Board of Education. (Education Code 49013, 51222, 51223, 51228.3, 52075)

For complaints alleging noncompliance with the law regarding student fees, the district, by engaging in reasonable efforts, shall attempt in good faith to identify and fully reimburse all affected students and parents/guardians who paid the unlawful student fees within one year prior to the filing of the complaint. (Education Code 49013; 5 CCR 4600)

Appeals to the California Department of Education

Any complainant who is dissatisfied with the district's investigation report on a complaint regarding any specified federal or state educational program subject to UCP may file an appeal in writing with CDE within 30 calendar days of receiving the district's investigation report. (5 CCR 4632)

The appeal shall be sent to CDE with a copy of the original locally filed complaint and a copy of the district's investigation report for that complaint. The complainant shall specify and explain the basis for the appeal, including at least one of the following: (5 CCR 4632)

1. The district failed to follow its complaint procedures.
2. Relative to the allegations of the complaint, the district's investigation report lacks material findings of fact necessary to reach a conclusion of law.
3. The material findings of fact in the district's investigation report are not supported by substantial evidence.
4. The legal conclusion in the district's investigation report is inconsistent with the law.
5. In a case in which the district found noncompliance, the corrective actions fail to provide a proper remedy.

CSBA NOTE: 5 CCR 4633 requires the district to submit the following documents to CDE within 10 days after the district has been notified that an appeal has been filed. The district's failure to provide a timely and complete response may result in CDE ruling on the appeal without considering information from the district.

Upon notification by CDE that the district's investigation report has been appealed, the Superintendent or designee shall forward the following documents to CDE within 10 days of the date of notification: (5 CCR 4633)

1. A copy of the original complaint
2. A copy of the district's investigation report

3. A copy of the investigation file including, but not limited to, all notes, interviews, and documents submitted by the parties and gathered by the investigator
4. A report of any action taken to resolve the complaint
5. A copy of the district's UCP
6. Other relevant information requested by CDE

If notified by CDE that the district's investigation report failed to address allegation(s) raised by the complaint, the district shall, within 20 days of the notification, provide CDE and the appellant with an amended investigation report that addresses the allegation(s) that were not addressed in the original investigation report. The amended report shall also inform the appellant of the right to separately appeal the amended report with respect to the allegation(s) that were not addressed in the original report. (5 CCR 4632)

CSBA NOTE: Pursuant to 5 CCR 4633, CDE is required to issue a written decision regarding the appeal within 60 days of CDE's receipt of the appeal, unless extended by written agreement with the appellant or documentation by CDE of exceptional circumstances. Pursuant to 5 CCR 4635, if CDE's decision was issued based on evidence in the investigation file CDE received from the district or evidence uncovered after further investigation of the allegations that were the basis of the appeal, either party may request reconsideration by the ~~Superintendent of Public Instruction~~ SPI or designee within 30 days of the appeal decision.

Pursuant to 5 CCR 4650, CDE may directly intervene in a complaint without waiting for action by the district when certain conditions exist, including the following: (1) the complaint alleges failure to comply with the UCP, including failure to follow the required timelines and failure to implement the final investigation report; (2) the complainant requests anonymity due to the possibility of retaliation and would suffer immediate and irreparable harm if a complaint was filed and the complainant was named; or (3) the complainant would suffer immediate and irreparable harm as a result of an application of a districtwide policy that is in conflict with state or federal law and that filing a complaint would be futile.

Health and Safety Complaints in License-Exempt Preschool Programs

CSBA NOTE: The following section is for use by districts that operate any license-exempt CSPP program. Education Code 8212, as renumbered by AB 131 (Ch. 116, Statutes of 2021), mandates districts to adopt policies and procedures for resolving complaints regarding specified health and safety issues in a license-exempt CSPP program. Pursuant to Education Code 8212, the district must use the UCP, with modifications as necessary, to resolve such complaints. Pursuant to 5 CCR 4610, such complaints must be addressed through the procedures described in 5 CCR 4690-4694.

See the accompanying exhibits for a sample classroom notice and complaint form.

Any complaint regarding health or safety issues in a license-exempt California State Preschool Program (CSPP) shall be addressed through the procedures described in 5 CCR 4690-4694.

In order to identify appropriate subjects of CSPP health and safety issues pursuant to Health and Safety Code 1596.7925, a notice shall be posted in each license-exempt CSPP classroom in the district notifying parents/guardians, students, and teachers of the health and safety requirements of Title 5 regulations that apply to CSPP programs pursuant to Health and Safety Code 1596.7925 and the location at which to obtain a form to file any complaint alleging noncompliance with those requirements. For this purpose, the Superintendent or designee may download and post a notice

available from the CDE ~~web site~~[website](#). (Education Code 8212; 5 CCR 4691)

The district's annual UCP notification distributed pursuant to 5 CCR 4622 shall clearly indicate which of its CSPP programs are operating as exempt from licensing and which CSPP programs are operating pursuant to requirements under Title 22 of the Code of Regulations. (5 CCR 4691)

Any complaint regarding specified health or safety issues in a license-exempt CSPP program shall be filed with the preschool program administrator or designee, and may be filed anonymously. The complaint form shall specify the location for filing the complaint, contain a space to indicate whether the complainant desires a response to the complaint, and allow a complainant to add as much text as desired to explain the complaint. (Education Code 8212; 5 CCR 4690)

If it is determined that the complaint is beyond the authority of the preschool program administrator, the matter shall be forwarded to the Superintendent or designee in a timely manner, not to exceed 10 working days, for resolution. The preschool administrator or the Superintendent or designee shall make all reasonable efforts to investigate any complaint within their authority. (Education Code 8212; 5 CCR 4692)

Investigation of a complaint regarding health or safety issues in a license-exempt CSPP program shall begin within 10 days of receipt of the complaint. (Education Code 8212; 5 CCR 4692)

The preschool administrator or designee shall remedy a valid complaint within a reasonable time period not to exceed 30 working days from the date the complaint was received. If the complainant has indicated on the complaint form a desire to receive a response to the complaint, the preschool administrator or Superintendent's designee shall, within 45 working days of the initial filing of the complaint, report the resolution of the complaint to the complainant and CDE's assigned field consultant. If the preschool administrator makes this report, the information shall be reported at the same time to the Superintendent or designee. (Education Code 8212; 5 CCR 4692)

CSBA NOTE: Education Code 48985 requires that reports sent to parents/guardians be written in their primary language when 15 percent or more of a school's enrolled students speak a single primary language other than English. During the FPM process, CDE staff will check to ensure compliance with this requirement. Based on Title VI of the Civil Rights Act of 1964, OCR requires districts to ensure meaningful access to all relevant UCP information for parents/guardians with limited English proficiency.

If a complaint regarding health or safety issues in a license-exempt CSPP program involves an LEP student or parent/guardian, then the district's response, if requested by the complainant, and the investigation report shall be written in English and the primary language in which the complaint was filed.

If a complainant is not satisfied with the resolution of a complaint, the complainant has the right to describe the complaint to the Board at a regularly scheduled hearing and, within 30 days of the date of the written report, may file a written appeal of the district's decision to the Superintendent of Public Instruction in accordance with 5 CCR 4632. (Education Code 8212; 5 CCR 4693, 4694)

All complaints and responses are public records. (5 CCR 4690)

On a quarterly basis, the Superintendent or designee shall report summarized data on the nature and resolution of all CSPP health and safety complaints, including the number of complaints by general subject area with the number of resolved and unresolved complaints, to the Board at a regularly scheduled Board meeting and to the County Superintendent. (5 CCR 4693)

Policy Reference UPDATE Service

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Policy Reference Disclaimer:

These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State	Description
2 CCR 11023	Harassment and discrimination prevention and correction
5 CCR 15580-15584	Child nutrition programs complaint procedures
5 CCR 3200-3205	Special education compliance complaints
5 CCR 4600-4670	Uniform complaint procedures
5 CCR 4600-4687	Uniform complaint procedures and Williams complaints
5 CCR 4690-4694	Complaints regarding health and safety issues in license-exempt preschool programs
5 CCR 4900-4965	Nondiscrimination in elementary and secondary educational programs receiving state or federal financial assistance
Ed. Code 18100-18203	School libraries
Ed. Code 200-262.4	Prohibition of discrimination
Ed. Code 32280-32289.5	School safety plans
Ed. Code 35186	Williams uniform complaint procedures
Ed. Code 46015	Parental leave for students
Ed. Code 48645.7	Juvenile court schools
Ed. Code 48853-48853.5	Foster youth
Ed. Code 48985	Notices to parents in language other than English
Ed. Code 49010-49013	Student fees
Ed. Code 49060-49079	Student records
Ed. Code 49069.5	Records of foster youth
Ed. Code 49490-49590	Child nutrition programs
Ed. Code 49701	Provisions of the Interstate Compact on Educational Opportunities for Military Children
<u>Ed. Code 51204.5</u>	<u>Social sciences instruction; contributions of specified groups</u>
Ed. Code 51210	Course of study for grades 1-6
Ed. Code 51222	Physical education
Ed. Code 51223	Physical education; elementary schools

Ed. Code 51225.1-51225.2	Foster youth, homeless children, former juvenile court school students; course credits; graduation requirements
Ed. Code 51226-51226.1	Career technical education
Ed. Code 51228.1-51228.3	Course periods without educational content
<u>Ed. Code 51501</u>	<u>Nondiscriminatory subject matter</u>
Ed. Code 52059.5	Statewide system of support
Ed. Code 52060-52077	Local control and accountability plan
Ed. Code 52075	Complaint for lack of compliance with local control and accountability plan requirements
Ed. Code 52300-52462	Career technical education
Ed. Code 52500-52617	Adult schools
Ed. Code 54400-54425	Compensatory education programs
Ed. Code 54440-54445	Migrant education
Ed. Code 54460-54529	Compensatory education programs
Ed. Code 59000-59300	Special schools and centers
<u>Ed. Code 60010</u>	<u>Instructional materials; definition</u>
<u>Ed. Code 60040-60052</u>	<u>Requirements for instructional materials</u>
Ed. Code 64000-64001	Consolidated application process; school plan for student achievement
Ed. Code 65000-65001	School site councils
Ed. Code 8200-8488	Child care and development programs
Ed. Code 8500-8538	Adult basic education
Gov. Code 11135	Prohibition of discrimination
Gov. Code 12900-12996	Fair Employment and Housing Act
H&S Code 1596.792	California Child Day Care Act; general provisions and definitions
H&S Code 1596.7925	California Child Day Care Act; health and safety regulations
Pen. Code 422.55	Definition of hate crime
Pen. Code 422.6	Crimes; harassment
Federal	Description
20 USC 1221	Application of laws
20 USC 1232g	Family Educational Rights and Privacy Act (FERPA) of 1974
20 USC 1681-1688	Title IX of the Education Amendments of 1972; discrimination based on sex

20 USC 6301-6576	Title I Improving the Academic Achievement of the Disadvantaged
20 USC 6801-7014	Title III language instruction for limited English proficient and immigrant students
28 CFR 35.107	Nondiscrimination on basis of disability; complaints
29 USC 794	Rehabilitation Act of 1973; Section 504
34 CFR 100.3	Prohibition of discrimination on basis of race, color or national origin
34 CFR 104.7	Section 504; Designation of responsible employee and adoption of grievances procedures
34 CFR 106.1-106.82	Nondiscrimination on the basis of sex in education programs
34 CFR 106.30	Discrimination on the basis of sex in education programs and activities; definitions
34 CFR 106.44	Recipient's response to sexual harassment
34 CFR 106.45	Grievance process for formal complaints of sexual harassment
34 CFR 106.8	Designation of coordinator; dissemination of policy, and adoption of grievance procedures
34 CFR 110.25	Notification of nondiscrimination on the basis of age
34 CFR 99.1-99.67	Family Educational Rights and Privacy
42 USC 11431-11435	McKinney-Vento Homeless Assistance Act
42 USC 12101-12213	Americans with Disabilities Act
42 USC 2000d- 2000e-17 2000d-7	Title VI and Title VII Civil Rights Act of 1964, as amended
42 USC 2000h-2-2000h-6	Title IX of the Civil Rights Act of 1964
42 USC 6101-6107	Age Discrimination Act of 1975

Management Resources

Description

California Department of Education Publication	Uniform Complaint Procedure 2021-22 Program Instrument
California Department of Education Publication	Sample UCP Board Policies and Procedures
U.S. DOE, Office for Civil Rights Publication	Part 1: Questions and Answers Regarding the Department's Title IX Regulations, January 2021
U.S. DOE, Office for Civil Rights Publication	Questions and Answers on the Title IX Regulations on Sexual Harassment, July 2021
U.S. DOE, Office for Civil Rights Publication	Dear Colleague Letter: Responding to Bullying of Students with Disabilities, October 2014
U.S. DOJ Publication	Guidance to Federal Financial Assistance Recipients Regarding Title VI Prohibition Against National Origin Discrimination Affecting Limited English Proficient Persons, 2007

Website	CSBA District and County Office of Education Legal Services
Website	Student Privacy Policy Office
Website	U.S. Department of Agriculture
Website	California Department of Social Services
Website	U.S. Department of Justice
Website	California Department of Education
Website	CSBA
Website	U.S. Department of Education, Office for Civil Rights
Website	California Civil Rights Department

Cross References

Code	Description
0410	Nondiscrimination In District Programs And Activities
0420	School Plans/Site Councils
0420	School Plans/Site Councils
0420.41	Charter School Oversight
0420.41-E(1)	Charter School Oversight
0430	Comprehensive Local Plan For Special Education
0430	Comprehensive Local Plan For Special Education
0450	Comprehensive Safety Plan
0450	Comprehensive Safety Plan
0460	Local Control And Accountability Plan
0460	Local Control And Accountability Plan
0470	COVID-19 Mitigation Plan
1100	Communication With The Public
1113	District And School Websites
1113	District And School Websites
1113-E(1)	District And School Websites
1114	District-Sponsored Social Media
1114	District-Sponsored Social Media
1220	Citizen Advisory Committees
1220	Citizen Advisory Committees
1250	Visitors/Outsiders

1250	Visitors/Outsiders
1312.1	Complaints Concerning District Employees
1312.1	Complaints Concerning District Employees
1312.2	Complaints Concerning Instructional Materials
1312.2	Complaints Concerning Instructional Materials
1312.2-E(1)	Complaints Concerning Instructional Materials
1312.4	Williams Uniform Complaint Procedures
1312.4-E(1)	Williams Uniform Complaint Procedures
1312.4-E(2)	Williams Uniform Complaint Procedures
1313	Civility
1340	Access To District Records
1340	Access To District Records
3260	Fees And Charges
3260	Fees And Charges
3555	Nutrition Program Compliance
3555-E(1)	Nutrition Program Compliance
3580	District Records
3580	District Records
4030	Nondiscrimination In Employment
4030	Nondiscrimination In Employment
4112.23	Special Education Staff
4112.9	Employee Notifications
4112.9-E(1)	Employee Notifications
4118	Dismissal/Suspension/Disciplinary Action
4118	Dismissal/Suspension/Disciplinary Action
4119.1	Civil And Legal Rights
4119.11	Sexual Harassment
4119.11	Sexual Harassment
4119.23	Unauthorized Release Of Confidential/Privileged Information
4131	Staff Development
4212.9	Employee Notifications
4212.9-E(1)	Employee Notifications
4218	Dismissal/Suspension/Disciplinary Action

4218	Dismissal/Suspension/Disciplinary Action
4219.1	Civil And Legal Rights
4219.11	Sexual Harassment
4219.11	Sexual Harassment
4219.23	Unauthorized Release Of Confidential/Privileged Information
4231	Staff Development
4244	Complaints
4244	Complaints
4312.9	Employee Notifications
4312.9-E(1)	Employee Notifications
4319.1	Civil And Legal Rights
4319.11	Sexual Harassment
4319.11	Sexual Harassment
4319.23	Unauthorized Release Of Confidential/Privileged Information
4331	Staff Development
4344	Complaints
4344	Complaints
5116.1	Intradistrict Open Enrollment
5116.1	Intradistrict Open Enrollment
5117	Interdistrict Attendance
5117	Interdistrict Attendance
5125	Student Records
5125	Student Records
5131.62	Tobacco
5131.62	Tobacco
5137	Positive School Climate
5141.22	Infectious Diseases
5141.22	Infectious Diseases
5141.4	Child Abuse Prevention And Reporting
5141.4	Child Abuse Prevention And Reporting
5144	Discipline
5144	Discipline
5144.1	Suspension And Expulsion/Due Process

5144.1	Suspension And Expulsion/Due Process
5145.3	Nondiscrimination/Harassment
5145.3	Nondiscrimination/Harassment
5145.6	Parent/Guardian Notifications
5145.6-E(1)	Parent/Guardian Notifications
5145.7	Sexual Harassment
5145.7	Sexual Harassment
5145.71	Title IX Sexual Harassment Complaint Procedures
5145.71-E(1)	Title IX Sexual Harassment Complaint Procedures
5145.9	Hate-Motivated Behavior
5146	Married/Pregnant/Parenting Students
5148	Child Care And Development
5148	Child Care And Development
5148.2	Before/After School Programs
5148.2	Before/After School Programs
5148.3	Preschool/Early Childhood Education
5148.3	Preschool/Early Childhood Education
6142.1	Sexual Health And HIV/AIDS Prevention Instruction
6142.1	Sexual Health And HIV/AIDS Prevention Instruction
6142.7	Physical Education And Activity
6142.7	Physical Education And Activity
6145	Extracurricular And Cocurricular Activities
6145	Extracurricular And Cocurricular Activities
6145.2	Athletic Competition
6145.2	Athletic Competition
6146.1	High School Graduation Requirements
6152	Class Assignment
6159	Individualized Education Program
6159	Individualized Education Program
6159.1	Procedural Safeguards And Complaints For Special Education
6159.1	Procedural Safeguards And Complaints For Special Education
6159.2	Nonpublic, Nonsectarian School And Agency Services For Special Education

6159.2	Nonpublic, Nonsectarian School And Agency Services For Special Education
6159.3	Appointment Of Surrogate Parent For Special Education Students
6159.3	Appointment Of Surrogate Parent For Special Education Students
<u>6161.1</u>	<u>Selection and Evaluation of Instructional Materials</u>
6164.2	Guidance/Counseling Services
6164.4	Identification And Evaluation Of Individuals For Special Education
6164.4	Identification And Evaluation Of Individuals For Special Education
6164.5	Student Success Teams
6164.5	Student Success Teams
6171	Title I Programs
6171	Title I Programs
6173	Education For Homeless Children
6173	Education For Homeless Children
6173-E(1)	Education For Homeless Children
6173-E(2)	Education For Homeless Children
6173.1	Education For Foster Youth
6173.1	Education For Foster Youth
6173.2	Education Of Children Of Military Families
6173.2	Education Of Children Of Military Families
6173.3	Education For Juvenile Court School Students
6175	Migrant Education Program
6175	Migrant Education Program
6178	Career Technical Education
6178	Career Technical Education
6178.1	Work-Based Learning
6178.1	Work-Based Learning
6178.2	Regional Occupational Center/Program
6200	Adult Education
6200	Adult Education
9000	Role Of The Board

9011	Disclosure Of Confidential/Privileged Information
9012	Board Member Electronic Communications
9124	Attorney
9200	Limits Of Board Member Authority
9321	Closed Session
9321-E(1)	Closed Session
9321-E(2)	Closed Session
9322	Agenda/Meeting Materials

Regulation 1312.4: Williams Uniform Complaint Procedures

Status: ADOPTED

Original Adopted Date: 11/01/2010 | **Last Revised Date:** 06/10/01/2022/2023 | **Last Reviewed Date:** 06/10/01/2022/2023

CSBA NOTE: Education Code 35186 mandates that districts establish policies and procedures to address complaints regarding insufficiency of textbooks and instructional materials, teacher vacancy or misassignment, and emergency or urgent facilities conditions that pose a threat to the health and safety of students or staff. When such a complaint is filed with the district, the district is required to investigate and resolve the complaint in accordance with the Williams uniform complaint procedures established pursuant to 5 CCR 4680-4687.

It is recommended that districts use these procedures only for complaints specified in law and this administrative regulation. See BP/AR 1312.3 - Uniform Complaint Procedures for a discussion of the types of complaints subject to the uniform complaint procedures established pursuant to 5 CCR 4600-4670. , and for [license-exempt preschool programs pursuant to 5 CCR 4690-4694](#). For procedures related to complaints about employees, see BP/AR 1312.1 - Complaints Concerning District Employees. For complaints concerning the district's adoption and selection of specific instructional materials, see BP/AR 1312.2 - Complaints Concerning Instructional Materials. For complaints regarding the district's nutrition program, see BP 3555 - Nutrition Program Compliance.

Types of Complaints

The district shall use the procedures described in this administrative regulation only to investigate and resolve the following:

CSBA NOTE: Education Code 242, as added by AB 1078 (Ch. 229, Statutes of 2023), requires the California Department of Education (CDE) to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum.

Pursuant to Education Code 60119, boards are required to hold a public hearing annually regarding the sufficiency of instructional materials. If, at the public hearing, the Governing Board makes a determination of "insufficient materials", Education Code 1240, as amended by AB 1078, requires the Board to take certain actions and specifies potential consequences for not remedying the deficiency as required by law; see BP 6161.1 – Selection and Evaluation of Instructional Materials.

1. 1. Complaints regarding the insufficiency of textbooks and instructional materials, including any complaint alleging that: (Education Code 35186; 5 CCR 4681)
 - a. a. A student, including an English learner, does not have standards-aligned textbooks or instructional materials or state- or district-adopted textbooks or other required instructional materials to use in class.
 - b. b. A student does not have access to textbooks or instructional materials to use at home or after school. This does not require two sets of textbooks or instructional materials for each student.

- a. a. A condition poses an emergency or urgent threat to the health or safety of students or staff.

Emergency or urgent threat means structures or systems that are in a condition that poses a threat to the health and safety of students or staff while at school, including, but not limited to, gas leaks; nonfunctioning heating, ventilation, fire sprinklers, or air-conditioning systems; electrical power failure; major sewer line stoppage; major pest or vermin infestation; broken windows or exterior doors or gates that will not lock and that pose a security risk; abatement of hazardous materials previously undiscovered that pose an immediate threat to students or staff; structural damage creating a hazardous or uninhabitable condition; or any other condition deemed appropriate. (Education Code 17592.72)

- b. A school restroom has not been cleaned, maintained, or kept open in accordance with Education Code 35292.5.

Clean or maintained school restroom means a school restroom has been cleaned or maintained regularly, is fully operational, or has been stocked at all times with toilet paper, soap, ~~or~~ and paper towels or functional hand dryers. (Education Code 35292.5)

CSBA NOTE: Pursuant to Education Code 35292.5, as amended by SB 760 (Ch. 227, Statutes of 2023), districts may temporarily close a restroom for (1) a documented student safety concern, (2) an immediate threat to student safety, or (3) to repair the facility.

Open restroom means the school has kept all restrooms open during school hours when students are not in classes and has kept a sufficient number of restrooms open during school hours when students are in classes. This does not apply when the temporary closing of the restroom is necessary for a documented student safety concern, an immediate threat to student safety, or to ~~make repairs~~ repair the facility. (Education Code 35292.5)

CSBA NOTE: The following optional paragraph is for use by districts that maintain any of grades 6-12, and may be revised to reflect the grade levels served by the district.

Pursuant to Education Code 35292.6, as added by AB 367 (Ch. 664, Statutes of 2021), before the start of the 2022-23 school year, a school that serves any of grades 6-12 is required to stock the school's restrooms with menstrual products for use in connection with the menstrual cycle free of charge. See AR 3517 - Facilities Inspection.

Although Education Code 35292.6 does not require a complaint process, it is recommended that the Williams uniform complaint procedures be used to address any allegation of noncompliance with Education Code 35292.6 in order to ensure consistency in the procedures that districts use to address allegations of noncompliance with all restroom maintenance requirements. However, pursuant to 5 CCR 4610, any such district-permitted complaint may not be appealed to CDE.

In any school serving any of grades 6-12, a complaint may be filed alleging noncompliance with the requirement of Education Code 35292.6 to, at all times, stock and make available and accessible free of cost, an adequate supply of menstrual products in every women's and all-gender restroom, and in at least one men's restroom. (Education Code 35292.6)

Forms and Notices

The Superintendent or designee shall ensure a Williams complaint form is available at each school. However, complainants need not use the district's complaint form in order to file a complaint. (Education Code 35186; 5 CCR 4680)

CSBA NOTE: Education Code 35186 requires that the district's complaint form contain the elements stated in the following paragraph. In addition, Education Code 35186 requires that a notice be posted in each classroom in each school in the district, as specified below. See the accompanying exhibits for a sample form and classroom notice.

The Superintendent or designee shall ensure that the district's complaint form specifies the location for filing a complaint and contains a space to indicate whether the complainant desires a response to the complaint. A complainant may add as much text to explain the complaint as desired. (Education Code 35186; 5 CCR 4680)

The Superintendent or designee shall post in each classroom in each school a notice containing the components specified in Education Code 35186. (Education Code 35186)

Filing of Complaint

CSBA NOTE: Education Code 35186 requires that complaints be investigated and resolved within the timelines specified below. During the Federal Program Monitoring (FPM) process, ~~the California Department of Education (CDE)~~ CDE staff will expect to see statements regarding the filing of the complaint, the investigation, timelines, and the complainant's right to appeal to the ~~Governing~~ Board and to appeal facilities complaints to CDE, as detailed in the following section and the section "Investigation and Response" below.

A complaint alleging any condition(s) specified in the section "Types of Complaints" above shall be filed with the principal or designee at the school in which the complaint arises. A complaint about problems beyond the authority of the principal shall be forwarded to the Superintendent or designee in a timely manner, but not to exceed 10 working days. Complaints may be filed anonymously. (Education Code 35186; 5 CCR 4680)

CSBA NOTE: Pursuant to Education Code 35186, as amended by AB 1078, complaints related to instructional materials alleging that more than one student does not have sufficient textbooks or instructional materials as the result of an act by the Board, or the Board's failure to remedy the deficiency, may be filed with the Superintendent of Public Instruction (SPI) directly in addition to or in lieu of being filed with the district, and the SPI may directly intervene without waiting for an investigation, as described in the section "Investigation and Response" below.

Pursuant to Education Code 60150, as added by AB 1078, if the SPI finds that a district has not provided sufficient textbooks or instructional materials as required, CDE is required to take all remedial actions as specified in Education Code 1240, including purchasing textbooks and instructional materials. Additionally, the SPI is required to assess a financial penalty against the district's local control funding formula allocation.

A complaint alleging that more than one student does not have sufficient textbooks or instructional materials as the result of an act by the Board, or the Board's failure to remedy the deficiency, may be filed with the Superintendent of Public Instruction (SPI) directly in addition to or in lieu of being filed with the district. Any such complaint shall identify the basis and provide evidence to support its filing directly with the SPI. (Education Code 35186)

If the Superintendent or designee becomes aware that a complaint alleging insufficient textbooks or instructional materials that has been filed directly with the SPI but not with the district, the

Superintendent or designee may initiate an investigation in accordance with this administrative regulation, as described below, if there is sufficient evidence to do so.

Investigation and Response

The principal or a designee of the Superintendent shall make all reasonable efforts to investigate any problem within the principal's or designee's authority. (Education Code 35186; 5 CCR 4685)

The principal or Superintendent's designee shall remedy a valid complaint within a reasonable time period not to exceed 30 working days from the date the complaint was received. (Education Code 35186; 5 CCR 4685)

If the complainant has indicated on the complaint form a desire to receive a response to the complaint, the principal or Superintendent's designee shall send written resolution of the complaint to the mailing address of the complainant as indicated on the complaint within 45 working days of the initial filing of the complaint. If the principal makes this report, the information shall be reported at the same time to the Superintendent or designee. (Education Code 35186; 5 CCR 4680, 4685)

CSBA NOTE: Education Code 48985 specifies that, when 15 percent or more of the students enrolled in a particular school speak a single primary language other than English, all notices, reports, statements, or records sent to the parents/guardians of such students be written in English and in the primary language. Education Code 35186 requires that, when Education Code 48985 is applicable, any response requested by the complainant must be written in English and in the primary language in which the complaint was filed.

When Education Code 48985 is applicable and the complainant has requested a response, the response shall be written in English and in the primary language in which the complaint was filed. (Education Code 35186)

If a complainant is not satisfied with the resolution of a complaint, the complainant has the right to describe the complaint to the Governing Board at a regularly scheduled meeting. (Education Code 35186; 5 CCR 4686)

For any complaint concerning a facilities condition that poses an emergency or urgent threat to the health or safety of students or staff as described in Item #3a in the section "Types of Complaints" above, a complainant who is not satisfied with the resolution proffered by the principal or Superintendent or designee may file an appeal to the Superintendent of Public Instruction [SPI](#) within 15 days of receiving the district's response. The complainant shall comply with the appeal requirements specified in 5 CCR 4632. (Education Code 35186; 5 CCR 4687)

All complaints and written responses shall be public records. (Education Code 35186; 5 CCR 4686)

Reports

CSBA NOTE: During the FPM process, CDE staff will expect to see the following statement.

On a quarterly basis, the Superintendent or designee shall report, to the Board at a regularly scheduled Board meeting and to the County Superintendent of Schools, summarized data on the nature and resolution of all complaints. The report shall include the number of complaints by general subject area with the number of resolved and unresolved complaints. (Education Code 35186; 5 CCR 4686)

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State

5 CCR 4600-4670

Description

Uniform complaint procedures

5 CCR 4600-4687

Uniform complaint procedures and Williams complaints

[5 CCR 4690-4694](#)[Health and safety complaints in license-exempt preschool programs](#)

Ed. Code 1240

County superintendent of schools; duties

Ed. Code 17592.72

Urgent or emergency repairs; School Facility Emergency Repair Account

[Ed. Code 200-262.4](#)[Prohibition of discrimination](#)

Ed. Code 234.1

Student protections relating to discrimination, harassment, intimidation, and bullying

Ed. Code 33126

School accountability report card

Ed. Code 35186

Williams uniform complaint procedures

Ed. Code 35292.5-35292.6

Restrooms; maintenance and cleanliness

[Ed. Code 48907](#)[Exercise of free expression; time, place and manner rules and regulations](#)[Ed. Code 48950](#)[Speech and other communication](#)

Ed. Code 48985

Notices to parents in language other than English

[Ed. Code 51501](#)[Nondiscriminatory subject matter](#)[Ed. Code 60010](#)[Instructional materials; definition](#)[Ed. Code 60040-60052](#)[Requirements for instructional materials](#)

Ed. Code 60119

Hearing on sufficiency of instructional materials

[Ed. Code 60150](#)[Penalty for insufficiency of textbooks and instructional materials](#)**Federal**

20 USC 6314

Description

Title I schoolwide program

Management Resources

Website

Description

CSBA District and County Office of Education Legal Services

Website

State Allocation Board, Office of Public School Construction

[Website](#)[California Department of Education \(https://www.cde.ca.gov/\)](#)[Website](#)[California County Superintendents Educational Services Association \(https://ccsesa.org/\)](#)

Website	Department of Justice (https://oag.ca.gov/)
Website	U.S. Department of Education, Office for Civil Rights (https://www2.ed.gov/about/offices/list/ocr/index.html)
Website	California Department of Education, Williams Case
Website	California County Superintendents
Website	CSBA

Cross References

Code	Description
0410	Nondiscrimination In District Programs And Activities
0460	Local Control And Accountability Plan
0460	Local Control And Accountability Plan
1100	Communication With The Public
1250	Visitors/Outsiders
1250	Visitors/Outsiders
1312.2	Complaints Concerning Instructional Materials
1312.2	Complaints Concerning Instructional Materials
1312.2-E(1)	Complaints Concerning Instructional Materials
1312.3	Uniform Complaint Procedures
1312.3	Uniform Complaint Procedures
1312.3-E(1)	Uniform Complaint Procedures
1312.3-E(2)	Uniform Complaint Procedures
1340	Access To District Records
1340	Access To District Records
3270	Sale And Disposal Of Books, Equipment And Supplies
3270	Sale And Disposal Of Books, Equipment And Supplies
3514	Environmental Safety
3514	Environmental Safety
3514.2	Integrated Pest Management
3517	Facilities Inspection
3517-E(1)	Facilities Inspection
3550	Food Service/Child Nutrition Program
3550	Food Service/Child Nutrition Program
4112.2	Certification

4112.2	Certification
4112.22	Staff Teaching English Learners
4113	Assignment
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4144	Complaints
4144	Complaints
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4344	Complaints
<u>5145.3</u>	<u>Nondiscrimination/Harassment</u>
<u>6143</u>	<u>Courses Of Study</u>
6142.92	Mathematics Instruction
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6161.1	Selection And Evaluation Of Instructional Materials
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<u>6161.11</u>	<u>Supplementary Instructional Materials</u>
6161.2	Damaged Or Lost Instructional Materials
<u>6163.1</u>	<u>Library Media Centers</u>
9000	Role Of The Board
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Exhibit 1312.4-E(1): Williams Uniform Complaint Procedures

Status: ADOPTED

Original Adopted Date: 11/01/2007 | **Last Revised Date:** 03/10/01/2019/2023 | **Last Reviewed Date:** 03/10/01/2019/2023

CSBA NOTE: Education Code 35186 requires that the following notice be posted in each K-12 classroom in each school in the district. During the Federal Program Monitoring process, California Department of Education (CDE) staff will check to ensure that a notice is placed in each classroom in each school and that the notice contains all the information described below.

**NOTICE TO PARENTS/GUARDIANS, STUDENTS, AND TEACHERS:
K-12 COMPLAINT RIGHTS**

Parents/Guardians, Students, and Teachers:

Pursuant to Education Code 35186, you are hereby notified that:

1. There should be sufficient textbooks and instructional materials. That means each student, including an English learner, must have a textbook or instructional materials, or both, to use in class and to take home.

CSBA NOTE: Pursuant to Education Code 35292.5, as amended by SB 760 (Ch. 227, Statutes of 2023), districts may temporarily close a restroom for (1) a documented student safety concern, (2) an immediate threat to student safety, or (3) to repair the facility.

2. School facilities must be clean, safe, and maintained in good repair.

CSBA NOTE: Education Code 35186, as amended by SB 114 (Ch. 48, Statutes of 2023), requires that the Williams uniform complaint procedure be used to address a complaint related to teacher misassignment that claims that a teacher who lacks credentials or training to teach English learners is assigned to teach a class with one or more English learners in the class.

3. There should be no teacher vacancies or misassignments. There should be a teacher assigned to each class and not a series of substitutes or other temporary teachers. The teacher should have the proper credential to teach the class, including the certification required to teach English learners, if present.

Misassignment means the placement of a certificated employee in a teaching or services position for which the employee does not hold a legally recognized certificate or credential or the placement of a certificated employee in a teaching or services position that the employee is not otherwise authorized by statute to hold.

Teacher vacancy means a position to which a single designated certificated employee has not been assigned at the beginning of the year for an entire year or, if the position is for a one-semester course, a position to which a single designated certificated employee has not been assigned at the beginning of a semester for an entire semester.

CSBA NOTE: Education Code 35186 requires that the notice inform parents/guardians of the location to obtain a complaint form and provides that posting a notice downloadable from the CDE's [web site website](#) will satisfy this requirement. The law does not require that complaint form be placed in any specific location. The following paragraph lists locations where complaint forms may be available and should be modified to reflect district practice, including adding the school and district [web site website](#) addresses.

If you choose to file a complaint alleging that any of the above conditions is not being met, your complaint will be addressed through the district's Williams uniform complaint procedures as required by law. A complaint form may be obtained at the school office or district office, or downloaded from the school or district [web site website](#). You may also download a copy of the California Department of Education ([CDE](#)) complaint form from the following [web site](#): <http://www.cde.ca.gov/re/cp/uc> [CDE's, website when available](#). However, a complaint need not be filed using either the district's complaint form or the complaint form from the California Department of Education [CDE](#).

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State	Description
5 CCR 4600-4670	Uniform complaint procedures
5 CCR 4600-4687	Uniform complaint procedures and Williams complaints
5 CCR 4690-4694	Health and safety complaints in license-exempt preschool programs
Ed. Code 1240	County superintendent of schools; duties
Ed. Code 17592.72	Urgent or emergency repairs; School Facility Emergency Repair Account
Ed. Code 200-262.4	Prohibition of discrimination
Ed. Code 234.1	Student protections relating to discrimination, harassment, intimidation, and bullying
Ed. Code 33126	School accountability report card
Ed. Code 35186	Williams uniform complaint procedures
Ed. Code 35292.5-35292.6	Restrooms; maintenance and cleanliness
Ed. Code 48907	Exercise of free expression; time, place and manner rules and regulations
Ed. Code 48950	Speech and other communication
Ed. Code 48985	Notices to parents in language other than English
Ed. Code 51501	Nondiscriminatory subject matter

[Ed. Code 60010](#)

[Ed. Code 60040-60052](#)

Ed. Code 60119

[Ed. Code 60150](#)

Federal

20 USC 6314

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1312.3-E(2)

[Instructional materials; definition](#)

[Requirements for instructional materials](#)

Hearing on sufficiency of instructional materials

[Penalty for insufficiency of textbooks and instructional materials](#)

Description

Title I schoolwide program

Description

CSBA District and County Office of Education Legal Services

State Allocation Board, Office of Public School Construction

[California Department of Education \(https://www.cde.ca.gov/\)](#)

[California County Superintendents Educational Services Association \(https://ccsesa.org/\)](#)

[Department of Justice \(https://oag.ca.gov/\)](#)

[U.S. Department of Education, Office for Civil Rights \(https://www2.ed.gov/about/offices/list/ocr/index.html\)](#)

[California Department of Education, Williams Case](#)

[California County Superintendents](#)

CSBA

Description

Nondiscrimination In District Programs And Activities

Local Control And Accountability Plan

Local Control And Accountability Plan

Communication With The Public

Visitors/Outsiders

Visitors/Outsiders

Complaints Concerning Instructional Materials

Complaints Concerning Instructional Materials

Complaints Concerning Instructional Materials

Uniform Complaint Procedures

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3517-E(1)	Facilities Inspection
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4112.22	Staff Teaching English Learners
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<u>5145.3</u>	<u>Nondiscrimination/Harassment</u>
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6142.92	Mathematics Instruction
6161.1	Selection And Evaluation Of Instructional Materials
6161.1	Selection And Evaluation Of Instructional Materials
6161.1-E(1)	Selection And Evaluation Of Instructional Materials
<u>6161.11</u>	<u>Supplementary Instructional Materials</u>
6161.2	Damaged Or Lost Instructional Materials
<u>6163.1</u>	<u>Library Media Centers</u>
9000	Role Of The Board
9012	Board Member Electronic Communications

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Agenda/Meeting Materials

Exhibit 1312.4-E(2): Williams Uniform Complaint Procedures

Status: ADOPTED

Original Adopted Date: 11/01/2010 | **Last Revised Date:** 06/10/01/2022/2023 | **Last Reviewed Date:** 06/10/01/2022/2023

CSBA NOTE: Education Code 35186 creates the Williams uniform complaint procedures for the filing of complaints concerning deficiencies in textbooks or instructional materials, conditions of facilities that are not maintained in a clean or safe manner or in good repair, or teacher vacancy or misassignment. The following form contains elements required by Education Code 35186 and 5 CCR 4681-4683. During the Federal Program Monitoring process, California Department of Education staff will check to ensure that the complaint form includes all of the elements specified below.

**K-12 COMPLAINT FORM:
WILLIAMS UNIFORM COMPLAINT PROCEDURES**

Education Code 35186 creates a procedure for the filing of complaints concerning deficiencies related to instructional materials, conditions of facilities that are not maintained in a clean or safe manner or in good repair, or teacher vacancy or misassignment. The complaint and response are public documents as provided by law. Complaints may be filed anonymously. However, if you wish to receive a response to your complaint, you must provide the contact information below.

Response requested? Yes No

Contact information: (if response is requested)

Name: _____

Address: _____

Phone number: Day: _____ Evening: _____

E-mail address, if any: _____

Date problem was observed: _____

Location of the problem that is the subject of this complaint:

School name/address: _____

Course title/grade level and teacher name: _____

Room number/name of room/location of facility: _____

Only the following issues may be the subject of this complaint process. If you wish to complain about an issue not specified below, please contact the school or district for the appropriate district complaint procedure.

Specific issue(s) of the complaint: (Please check all that apply. A complaint may contain more than one allegation.)

1. Textbooks and instructional materials: (Education Code 35186; 5 CCR 4681)
 - o A student, including an English learner, does not have standards-aligned textbooks or instructional materials or state- or district-adopted textbooks or other required

instructional materials to use in class.

- A student does not have access to textbooks or instructional materials to use at home or after school. This does not require two sets of textbooks or instructional materials for each student.
- Textbooks or instructional materials are in poor or unusable condition, have missing pages, or are unreadable due to damage.
- A student was provided photocopied sheets from only a portion of a textbook or instructional materials to address a shortage of textbooks or instructional materials.

2. Teacher vacancy or misassignment: (Education Code 35186; 5 CCR 4682)

- A semester begins and a teacher vacancy exists. A *teacher vacancy* is a position to which a single designated certificated employee has not been assigned at the beginning of the school year for an entire year or, if the position is for a one-semester course, a position to which a single designated certificated employee has not been assigned at the beginning of a semester for an entire semester. ([5 CCR 4600](#))

[CSBA NOTE: Education Code 35186, as amended by SB 114 \(Ch. 48, Statutes of 2023\), requires that the Williams uniform complaint procedure be used to address a complaint related to teacher misassignment that claims that a teacher who lacks credentials or training to teach English learners is assigned to teach a class with one or more English learners in the class.](#)

- A teacher who lacks credentials or training to teach English learners is assigned to teach a class with [one or](#) more than 20 percent English learners in the class.
- A teacher is assigned to teach a class for which the teacher lacks subject matter competency.

3. Facilities conditions: (Education Code 17592.72, 35186, 35292.5, 35292.6; 5 CCR 4683)

- A condition exists that poses an emergency or urgent threat to the health or safety of students or staff including gas leaks; nonfunctioning heating, ventilation, fire sprinklers, or air-conditioning systems; electrical power failure; major sewer line stoppage; major pest or vermin infestation; broken windows or exterior doors or gates that will not lock and that pose a security risk; abatement of hazardous materials previously undiscovered that pose an immediate threat to students or staff; structural damage creating a hazardous or uninhabitable condition; and any other condition deemed appropriate by the district.
- A school restroom has not been cleaned or maintained regularly, is not fully operational, or has not been stocked at all times with toilet paper, soap, ~~or~~[and](#) paper towels or functional hand dryers.

[CSBA NOTE: The following optional item is for districts that choose to use the Williams uniform complaint procedures to address complaints alleging noncompliance with requirements to stock restrooms at certain schools with menstrual products pursuant to Education Code 35292.6; see the accompanying administrative regulation.](#)

- For a school serving any of grades 6-12, the school has not, at all times, stocked and made available and accessible free of cost, an adequate supply of menstrual products in every women’s and all-gender restroom, and in at least one men’s restroom.

CSBA NOTE: Pursuant to Education Code 35292.5, as amended by SB 760 (Ch. 227, Statutes of 2023), districts may temporarily close a restroom for (1) a documented student safety concern, (2) an immediate threat to student safety, or (3) to repair the facility.

- The school has not kept all restrooms open during school hours when students are not in classes and has not kept a sufficient number of restrooms open during school hours when students are in classes. This does not apply when temporary closing of the restroom is necessary for a documented student safety concern, an immediate threat to student safety, or to ~~make repairs~~repair the facility.

Please describe the issue of your complaint in detail. You may attach additional pages and include as much text as necessary to fully describe the situation. For complaints regarding facilities conditions, please describe the emergency or urgent facilities condition and how that condition poses a threat to the health or safety of students or staff.

CSBA NOTE: Education Code 35186 requires that complaints be filed with the principal or designee and that the complaint form specify the location for filing the complaint. Districts should specify the name and/or location in the spaces below.

Please file this complaint at the following location:

(principal or designee)

(address)

CSBA NOTE: Pursuant to Education Code 35186, as amended by AB 1078 (Ch. 229, Statutes of 2023), complaints related to instructional materials alleging that more than one student does not have sufficient textbooks or instructional materials as the result of an act by the Governing Board, or the Board’s failure to remedy the deficiency, may be filed with the Superintendent of Public Instruction (SPI) directly, and the SPI may directly intervene without waiting for an investigation by the district; see the accompanying administrative regulation for more information. The following paragraph may be used by districts to inform complainants about the option to file complaints directly with the SPI.

Please be aware that you may file a complaint directly with the Superintendent of Public Instruction if you are alleging that more than one student does not have sufficient textbooks or instructional materials as the result of an act by the Governing Board, or the Board’s failure to remedy the deficiency.

Please provide a signature below. If you wish to remain anonymous, a signature is not required. However, all complaints, even anonymous ones, should be dated.

(Signature)

(Date)

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State

5 CCR 4600-4670

Description

Uniform complaint procedures

5 CCR 4600-4687

Uniform complaint procedures and Williams complaints

[5 CCR 4690-4694](#)

[Health and safety complaints in license-exempt preschool programs](#)

Ed. Code 1240

County superintendent of schools; duties

Ed. Code 17592.72

Urgent or emergency repairs; School Facility Emergency Repair Account

[Ed. Code 200-262.4](#)

[Prohibition of discrimination](#)

Ed. Code 234.1

Student protections relating to discrimination, harassment, intimidation, and bullying

Ed. Code 33126

School accountability report card

Ed. Code 35186

Williams uniform complaint procedures

Ed. Code 35292.5-35292.6

Restrooms; maintenance and cleanliness

[Ed. Code 48907](#)

[Exercise of free expression; time, place and manner rules and regulations](#)

[Ed. Code 48950](#)

[Speech and other communication](#)

Ed. Code 48985

Notices to parents in language other than English

[Ed. Code 51501](#)

[Nondiscriminatory subject matter](#)

[Ed. Code 60010](#)

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[Ed. Code 60040-60052](#)

[Requirements for instructional materials](#)

Ed. Code 60119

Hearing on sufficiency of instructional materials

[Ed. Code 60150](#)

[Penalty for insufficiency of textbooks and instructional materials](#)

Federal	Description
20 USC 6314	Title I schoolwide program
Management Resources	Description
Website	CSBA District and County Office of Education Legal Services
Website	State Allocation Board, Office of Public School Construction
Website	California Department of Education (https://www.cde.ca.gov/)
Website	California County Superintendents Educational Services Association (https://ccsesa.org/)
Website	Department of Justice (https://oag.ca.gov/)
Website	U.S. Department of Education, Office for Civil Rights (https://www2.ed.gov/about/offices/list/ocr/index.html)
Website	California Department of Education, Williams Case
Website	California County Superintendents
Website	CSBA

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0410	Nondiscrimination In District Programs And Activities
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0460	Local Control And Accountability Plan
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1312.2	Complaints Concerning Instructional Materials
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1312.3	Uniform Complaint Procedures
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1312.3-E(1)	Uniform Complaint Procedures
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1340	Access To District Records
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3514.2	Integrated Pest Management
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3517-E(1)	Facilities Inspection
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4344	Complaints
<u>5145.3</u>	<u>Nondiscrimination/Harassment</u>
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<u>6161.11</u>	<u>Supplementary Instructional Materials</u>
6161.2	Damaged Or Lost Instructional Materials
<u>6163.1</u>	<u>Library Media Centers</u>
9000	Role Of The Board
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Policy 5145.3: Nondiscrimination/Harassment

Status: ADOPTED

Original Adopted Date: 10/01/2014 | **Last Revised Date:** 05~~10~~/01/2020~~2023~~ | **Last Reviewed Date:** 05~~10~~/01/2020~~2023~~

CSBA NOTE: The following **mandated** policy reflects various provisions of state and federal law which prohibit discrimination against students in educational programs and activities based on certain actual or perceived characteristics of an individual, ~~including~~ Education Code 220, which prohibits discrimination based on disability, race, nationality, immigration status, ethnicity, gender, gender identity, gender expression, sexual orientation, religion, or any other characteristic contained in the definition of hate crimes in Penal Code 422.55; Government Code 11135, which prohibits discrimination based on ~~all~~ **most of** the foregoing characteristics and on sex, color, ancestry, age, medical condition, marital status, and an individual's genetic information; Title VI of the Civil Rights Act of 1964 (42 USC 2000d-~~2000e-17~~, which ~~2000d-7~~) prohibits discrimination based on race, color, or national origin; Title IX (20 USC 1681-1688), which prohibits discrimination based on sex, gender, gender identity, pregnancy, and parental status; ~~the~~ The Age Discrimination Act of 1975 (42 USC 6101-6107), which prohibits discrimination based on age; ~~and Title II. The Americans with Disabilities Act (ADA)~~ (20 USC 12101-12213) and Section 504 (29 USC 794), which prohibit discrimination based on disability. Education Code 260 gives the Governing Board primary responsibility for ensuring that district programs and activities are free from discrimination based on age or any of the characteristics listed in Education Code 220. See also BP 0410 - Nondiscrimination in District Programs and Activities.

Moreover, this sample Board policy and the accompanying administrative regulation reflect the statutory right of a transgender student to participate in sex-segregated educational programs and use facilities consistent with one's gender identity as specified in Education Code 221.5, and best practices based on existing state and federal law. Districts with questions about the rights of transgender and gender-nonconforming students should consult CSBA's District and County Office of Education Legal Services or district legal counsel as appropriate. For more information on the rights of transgender students, see CSBA's Updated, "Legal Guidance: Protecting on Rights of Transgender and Gender Nonconforming Students Against Sex Discrimination in Schools."

Education Code 234.1 **mandates** that districts adopt policy as well as a process for prohibiting discrimination which applies to all acts related to school activity or school attendance occurring within a school or under the authority of the district, including discriminatory harassment, intimidation, and bullying, based on the foregoing characteristics. The California Department of Education (CDE), through its Federal Program Monitoring process, reviews districts' uniform complaint procedures (UCP) and other anti-discrimination policies and ~~practices~~ processes to ensure compliance with these requirements. In addition, the U.S. Department of Education's Office for Civil Rights (OCR) is responsible for the administrative enforcement of federal laws and regulations prohibiting discrimination on the basis of race, color, national origin, sex, disability, and age in programs and activities that receive federal financial assistance from the department, and requires the adoption of nondiscrimination policies and complaint procedures.

Education Code 234.1 requires that the district's nondiscrimination policy include a statement that the policy applies to all acts related to a school activity or school attendance and, as amended by AB 1078 (Ch. 229, Statute of 2023), all acts of the Board and the Superintendent in enacting policies and procedures that govern the district. Education Code 234.1, as amended by AB 1078,

contains similar language regarding the County Board of Education and the County Superintendent of Schools.

Education Code 243, as added by AB 1078, clarifies when it is unlawful discrimination for the Board to (1) refuse to approve the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library or (2) prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library. The Board may not refuse to approve such use on the basis that the material includes a study of the role and contributions of specified individuals or groups, unless the study of the role and contributions reflects adversely upon legally protected groups. Additionally, the Board may not prohibit such use on the basis that the study of the role and contributions contain inclusive or diverse perspectives.

OCR has clarified in several publications that conduct that occurs off campus may have an adverse effect on a student at school (i.e., create a "hostile environment" for the student). When that happens, the district has an obligation to investigate and to take steps to protect the student.

This policy shall apply to all acts constituting unlawful discrimination or harassment related to school activity or to school attendance occurring within a district school, and to acts which occur off campus or outside of school-related or school-sponsored activities but which may have an impact or create a hostile environment at school.

The , and to all acts of the Governing Board and the Superintendent in enacting policies and procedures that govern the district.

The Board desires to provide a welcoming, safe, and supportive school environment that allows all students equal access to and opportunities in the district's academic, extracurricular, and other educational support programs, services, and activities. The Board prohibits, at any district school or school activity, unlawful discrimination, including discriminatory harassment, intimidation, and bullying, targeted at any student by anyone, based on the student's actual or perceived race, color, ancestry, nationality, national origin, immigration status, ethnic group identification, ethnicity, age, religion, marital status, pregnancy, parental status, physical or mental disability, medical condition, sex, sexual orientation, gender, gender identity, gender expression, or genetic information, or association with a person or group with one or more of these actual or perceived characteristics.

CSBA NOTE: OCR's August 2023 Dear Colleague Letter, "Race and School Programming," states that a district may not separate students based on race, but may include group discussions or activities that focus on race as part of the curriculum, courses, or programs so long as access or participation is not permitted or limited based on race. OCR guidance also provides that a school-sponsored program with emphasis on race, such as a student club, that is open to all students, typically would not violate Title VI solely because of its race-related theme.

Unlawful discrimination, including discriminatory harassment, intimidation, or bullying, may result from physical, verbal, nonverbal, or written conduct based on any of the categories listed above. Unlawful discrimination also occurs when prohibited conduct is so severe, persistent, or pervasive that it affects a student's ability to participate in or benefit from an educational program or activity; creates an intimidating, threatening, hostile, or offensive educational environment; has the effect of substantially or unreasonably interfering with a student's academic performance; or otherwise adversely affects a student's educational opportunities.

CSBA NOTE: In addition to the types of prohibited student conduct described above, unlawful discrimination includes different treatment of students with respect to the provision of

opportunities to participate in school programs or activities or the provision or receipt of educational benefits or services. See BP 0410 - Nondiscrimination in District Programs and Activities.

Unlawful discrimination also includes disparate treatment of students based on one of the categories above with respect to the provision of opportunities to participate in school programs or activities or the provision or receipt of educational benefits or services.

CSBA NOTE: Unlawful discrimination may occur when disciplining students. OCR's guidance, "Supporting Students with Disabilities and Avoiding the Discriminatory Use of Student Discipline under Section 504 of the Rehabilitation Act of 1973," "Resource on Confronting Racial Discrimination in Student Discipline," and "Creating Inclusive and Nondiscriminatory School Environments for LGBTQI+ Students," address discrimination in the use of discipline based on disability, race, and gender expression. For more information regarding student discipline, see BP/AR 5144 - Discipline, BP/AR 5144.1 - Suspension and Expulsion/Due Process, and AR 5144.2 - Suspension and Expulsion/Due Process (Students With Disabilities).

Because unlawful discrimination may occur when disciplining students, including suspension and expulsion, the Superintendent or designee shall ensure that staff enforce discipline rules fairly, consistently and in a non-discriminatory manner, as specified in Board Policy and Administrative Regulation 5144 - Discipline, Board Policy and Administrative Regulation 5144.1 - Suspension and Expulsion/Due Process, and Administrative Regulation 5144.2 - Suspension and Expulsion/Due Process (Students With Disabilities).

The Board also prohibits any form of retaliation against any individual who reports or participates in the reporting of unlawful discrimination, files or participates in the filing of a complaint, or investigates or participates in the investigation of a complaint or report alleging unlawful discrimination. Retaliation complaints shall be investigated and resolved in the same manner as a discrimination complaint.

CSBA NOTE: Pursuant to Education Code 234.1 and 34 CFR 106.98, a district is required to publicize its nondiscrimination policies to the school community. In addition, Education Code 234.6, as added by AB 34 (Ch. 282, Statutes of 2019), requires the district, starting in the 2020-21 school year, to make readily accessible on its ~~web site~~ website its nondiscrimination, sexual harassment, suicide prevention, and other specified policies and information related to specified state and federal laws and resources. For further information regarding specific posting requirements, see "Measures to Prevent Discrimination" in the accompanying administrative regulation.

The Superintendent or designee shall facilitate students' access to the educational program by publicizing the district's nondiscrimination policy and related complaint procedures to students, parents/guardians, and employees. In addition, the Superintendent or designee shall post the district's policies prohibiting discrimination, harassment, intimidation, and bullying and other required information on the district's ~~web site~~ website in a manner that is easily accessible to parents/guardians and students, in accordance with law and the accompanying administrative regulation. (Education Code 234.1, 234.6)

CSBA NOTE: In its October 2010 Dear Colleague Letter: Harassment and Bullying, OCR identifies training of the school community as one of the key measures for minimizing discriminatory and harassing behavior in school. See the accompanying administrative regulation for specific measures to prevent discrimination and facilitate students' access to the educational program. The following paragraph may be modified to reflect district practice.

The Superintendent or designee shall provide training and/or information on the scope and use of the policy and complaint procedures and take other measures designed to increase the school

community's understanding of the requirements of law related to discrimination. The Superintendent or designee shall regularly review the implementation of the district's nondiscrimination policies and practices and, as necessary, shall take action to remove any identified barrier to student access to or participation in the district's educational program. The Superintendent or designee shall report the findings and recommendations to the Board after each review.

Regardless of whether a complainant complies with the writing, timeline, and/or other formal filing requirements, all complaints alleging unlawful discrimination, including discriminatory harassment, intimidation, or bullying, shall be investigated and prompt action taken to stop the discrimination, prevent recurrence, and address any continuing effect on students.

CSBA NOTE: Policies related to discrimination must be consistent with the First Amendment right to free speech. Education Code 48950 prohibits a district from subjecting a high school student to disciplinary sanctions solely on the basis of speech or other communication that would be constitutionally protected if engaged in outside of campus. However, Education Code 48950 also specifies that the law does not prohibit discipline for harassment, threats, or intimidation unless constitutionally protected. Whether such speech might be entitled to constitutional protection would be determined on a case-by-case basis, with consideration for the specific words used and the circumstances involved. The district should consult [CSBA's District and County Office of Education Legal Services or district](#) legal counsel as necessary.

Students who engage in unlawful discrimination, including discriminatory harassment, intimidation, retaliation, or bullying, in violation of law, Board policy, or administrative regulation shall be subject to appropriate consequence or discipline, which may include suspension or expulsion when the behavior is severe or pervasive as defined in Education Code 48900.4. Any employee who permits or engages in prohibited discrimination, including discriminatory harassment, intimidation, retaliation, or bullying, shall be subject to disciplinary action, up to and including dismissal.

CSBA NOTE: [Education Code 234.1 requires that districts adopt a process for receiving and investigating complaints of unlawful discrimination, including discriminatory harassment, intimidation, retaliation, and bullying that is consistent with the district's UCP specified in 5 CCR 4600-4670.](#)

[All allegations of unlawful discrimination in district programs and activities shall be brought, investigated, and resolved in accordance with Board Policy 1312.3 - Uniform Complaint Procedures.](#)

Record-Keeping

The Superintendent or designee shall maintain a record of all reported cases of unlawful discrimination, including discriminatory harassment, intimidation, or bullying, to enable the district to monitor, address, and prevent repetitive prohibited behavior in district schools.

Policy Reference UPDATE Service

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Policy Reference Disclaimer:

These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State

Description

5 CCR 432	Student records
5 CCR 4600-4670	Uniform complaint procedures
5 CCR 4900-4965	Nondiscrimination in elementary and secondary educational programs receiving state or federal financial assistance
Civ. Code 1714.1	Liability of parent or guardian for act of willful misconduct by a minor
Ed. Code 200-262.4	Prohibition of discrimination
Ed. Code 48900.3	Suspension or expulsion for act of hate violence
Ed. Code 48900.4	Suspension or expulsion for harassment, threats, or intimidation
Ed. Code 48904	Liability of parent/guardian for willful student misconduct
Ed. Code 48907	Exercise of free expression; time, place and manner rules and regulations
Ed. Code 48950	Speech and other communication
Ed. Code 48985	Notices to parents in language other than English
Ed. Code 49020-49023	Athletic programs
Ed. Code 49060-49079	Student records
Ed. Code 51204.5	Social sciences instruction; contributions of specified groups
Ed. Code 51500	Prohibited instruction or activity
Ed. Code 51501	Prohibited means of instruction Nondiscriminatory subject matter
Ed. Code 60010	Instructional materials; definition
Ed. Code 60044 60040-60052	Prohibited Requirements for instructional materials
Gov. Code 11135	Prohibition of discrimination
Pen. Code 422.55	Definition of hate crime
Pen. Code 422.6	Crimes; harassment
Federal	Description
20 USC 1681-1688	Title IX of the Education Amendments of 1972; discrimination based on sex
28 CFR 35.107	Nondiscrimination on basis of disability; complaints
29 USC 794	Rehabilitation Act of 1973; Section 504
34 CFR 100.3	Prohibition of discrimination on basis of race, color or national origin
34 CFR 104.7	Section 504; Designation of responsible employee and adoption of grievances procedures
34 CFR 104.8	Notice of Nondiscrimination on the Basis of Handicap

34 CFR 106.8	Designation of coordinator; dissemination of policy, and adoption of grievance procedures
34 CFR 106.30	Discrimination on the basis of sex; definitions
34 CFR 106.944-106.45	Severability Grievance process for formal complaints of sexual harassment
34 CFR 110.25	Prohibition of discrimination based on age
34 CFR 99.31	Disclosure of personally identifiable information
42 USC 12101-12213	Americans with Disabilities Act
42 USC 2000d-2000e-17	Title VI and Title VII Civil Rights Act of 1964, as amended
42 USC 2000h-2-2000h-6	Title IX of the Civil Rights Act of 1964
42 USC 6101-6107	Age Discrimination Act of 1975
Management Resources	Description
CA Office of the Attorney General Publication	Promoting a Safe & Secure Learning Environment for All: Guidance & Model Policies to Assist CA California's K-12 Schools in Responding to Immigration Issues , 4/ April 2018 (https://oag.ca.gov/sites/all/files/agweb/pdfs/bcj/school-guidance-model-k12.pdf)
Court Decision	Donovan v. Poway Unified School District, (2008) 167 Cal.App.4th 567
Court Decision	Flores v. Morgan Hill Unified School District, (2003, 9th Cir.) 324 F.3d 1130
CSBA Publication	Updated Legal Guidance: Protecting on Rights of Transgender and Gender Nonconforming Students Against Sex Discrimination , March 2017 in School, October 2022 (https://www.csba.org/-/media/CSBA/Files/Advocacy/LegalAdvocacy/Legal-Guidance-Transgender-Legal-10-2022.ashx?la=en&rev=a3fb600ee6d640598c038dfceaef871c)
First Amendment Center Publication	Public Schools and Sexual Orientation: A First Amendment Framework for Finding Common Ground , 2006
California Department of Education Publication	California Longitudinal Pupil Achievement Data System (CALPADS) Update FLASH #158: Guidance for Changing a Student's Gender in CALPADS , July 2019 (https://www.cde.ca.gov/ds/sp/cl/calpadsupdf158.asp)
U.S Dept of Ed DOE , Office for Civil Rights Publication	Resolution Agreement Between the Arcadia USD, US Dept of Ed, OCR, & the US DOJ, CRD, (2013) OCR 09-12-1020, DOJ 169-12C-70 (https://www.justice.gov/sites/default/files/crt/legacy/2013/07/26/arcadiaagree.pdf)
U.S. Dept. of Health & Human Services Publication	Guidance to Fed Fin. Assist. Federal Financial Assistance Recipients Re: Regarding Title VI Prohibition Against

	<p><u>National Origin Discrimination Affecting Limited English Proficient Persons, Aug. 2013</u> https://www.hhs.gov/civil-rights/for-individuals/special-topics/limited-english-proficiency/guidance-federal-financial-assistance-recipients-title-vi/index.html</p>
<p><u>U.S. DOE, Office for Civil Rights Publication</u></p>	<p><u>Questions and Answers on the Title IX Regulations on Sexual Harassment, June 2022</u> https://www2.ed.gov/about/offices/list/ocr/docs/202107-ga-titleix.pdf</p>
<p><u>U.S. DOE, Office for Civil Rights Publication</u></p>	<p><u>U.S. Department of Education Toolkit: Creating Inclusive and Nondiscriminatory School Environments for LGBTQI+ Students, June 2023</u> https://www2.ed.gov/about/offices/list/ocr/docs/lgbtqi-student-resources-toolkit-062023.pdf</p>
<p><u>U.S. DOE, Office for Civil Rights Publication</u></p>	<p><u>Supporting Students with Disabilities and Avoiding the Discriminatory Use of Student Discipline under Section 504 of the Rehabilitation Act of 1973, July 2022</u> https://www2.ed.gov/about/offices/list/ocr/docs/504-discipline-guidance.pdf</p>
<p><u>U.S. DOE, Office for Civil Rights and U.S. DOJ, Civil Rights Division Publication</u></p>	<p><u>Dear Colleague Letter: Harassment and Bullying, October 2010</u> <u>Resource on Confronting Racial Discrimination in Student Discipline, May 2023</u> https://www2.ed.gov/about/offices/list/ocr/docs/tvi-student-discipline-resource-202305.pdf</p>
<p><u>U.S. DOE Publication</u></p>	<p><u>Guidance on Constitutionally Protected Prayer and Religious Expression in Public Elementary and Secondary Schools, May 2023</u> https://www2.ed.gov/policy/gen/guid/religionandschools/prayer_guidance.html</p>
<p><u>U.S. DOE, Office for Civil Rights Publication</u></p>	<p><u>Dear Colleague Letter: Title IX Coordinators, April 2015</u> <u>Addressing Discrimination Against Jewish Students, May 2023</u> https://www2.ed.gov/about/offices/list/ocr/docs/antisemitism-dcl.pdf?utm_content=&utm_medium=email&utm_name=&utm_source=govdelivery&utm_term=</p>
<p><u>U.S. DOE, Office for Civil Rights Publication</u></p>	<p><u>Enforcement of Title IX of the Education Amendments of 1972 With Respect to Discrimination Based on Sexual Orientation and Gender Identity in Light of Bostock v. Clayton County, June 2021</u> https://www2.ed.gov/about/offices/list/ocr/docs/202106-titleix-noi.pdf?_cldee=YmxhaWZtYW5AY3NiYS5vcmc%3d&recipientid=contact-a1fe1b1b458fe61180ef005056b02a09-2649c94bee724cf58c51a008ab8c6b92&esid=a7f7c74b-7cd3-eb11-8145-005056b02a09</p>

[U.S. DOE, Office for Civil Rights Publication](#)

[Dear Colleague Letter: Race and School Programming, August 2023](#)

<https://www2.ed.gov/about/offices/list/ocr/letters/colleague-20230824.pdf>

U.S. DOE, Office for Civil Rights Publication

Examples of Policies and Emerging Practices for Supporting Transgender Students, May 2016

U.S. DOE, Office for Civil Rights Publication

Notice of Non-Discrimination, Fact Sheet, August 2010

Website

CSBA District and County Office of Education Legal Services

Website

First Amendment Center

Website

California Office of the Attorney General

Website

California Safe Schools Coalition

Website

CSBA

Website

California Department of Education

Website

U.S. Department of Education, Office for Civil Rights

Cross References

Code

Description

0410

Nondiscrimination In District Programs And Activities

0415

Equity

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Comprehensive Safety Plan

0450

Comprehensive Safety Plan

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COVID-19 Mitigation Plan

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District-Sponsored Social Media

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District-Sponsored Social Media

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Volunteer Assistance

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Volunteer Assistance

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Complaints Concerning District Employees

1312.1

Complaints Concerning District Employees

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[Complaints Concerning Instructional Materials](#)

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Uniform Complaint Procedures

1312.3

Uniform Complaint Procedures

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Uniform Complaint Procedures

[1312.4](#)

[Williams Uniform Complaint Procedures](#)

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1340	Access To District Records
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3515.4	Recovery For Property Loss Or Damage
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3530	Risk Management/Insurance
3553	Free And Reduced Price Meals
3553	Free And Reduced Price Meals
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3580	District Records
4112.6	Personnel Files
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4118	Dismissal/Suspension/Disciplinary Action
4118	Dismissal/Suspension/Disciplinary Action
4119.21	Professional Standards
4119.21-E(1)	Professional Standards
4119.23	Unauthorized Release Of Confidential/Privileged Information
4131	Staff Development
4212.6	Personnel Files
4212.9	Employee Notifications
4212.9-E(1)	Employee Notifications
4218	Dismissal/Suspension/Disciplinary Action
4218	Dismissal/Suspension/Disciplinary Action
4219.21	Professional Standards
4219.21-E(1)	Professional Standards
4219.23	Unauthorized Release Of Confidential/Privileged Information
4231	Staff Development
4312.6	Personnel Files
4312.9	Employee Notifications
4312.9-E(1)	Employee Notifications
4319.21	Professional Standards

4319.21-E(1)	Professional Standards
4319.23	Unauthorized Release Of Confidential/Privileged Information
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5000	Concepts And Roles
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5111	Admission
5111	Admission
5113.1	Chronic Absence And Truancy
5113.1	Chronic Absence And Truancy
5113.12	District School Attendance Review Board
5113.12	District School Attendance Review Board
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5131.5	Vandalism And Graffiti
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5132	Dress And Grooming
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5138	Conflict Resolution/Peer Mediation
5141.22	Infectious Diseases
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5141.27	Food Allergies/Special Dietary Needs
5141.27	Food Allergies/Special Dietary Needs
5141.4	Child Abuse Prevention And Reporting
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6143	Courses Of Study
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6145	Extracurricular And Cocurricular Activities
6145.2	Athletic Competition
6145.2	Athletic Competition
6153	School-Sponsored Trips
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6159.4	Behavioral Interventions For Special Education Students
6161.1	Selection And Evaluation Of Instructional Materials

6161.1	Selection And Evaluation Of Instructional Materials
6161.1-E(1)	Selection And Evaluation Of Instructional Materials
<u>6161.11</u>	<u>Supplementary Instructional Materials</u>
<u>6163.1</u>	<u>Library Media Centers</u>
6163.4	Student Use Of Technology
6163.4-E(1)	Student Use Of Technology
6164.2	Guidance/Counseling Services
6173.1	Education For Foster Youth
6173.1	Education For Foster Youth
7110	Facilities Master Plan

Policy 6143: Courses Of Study

Status: ADOPTED

Original Adopted Date: 03/01/2003 | **Last Revised Date:** 12/10/01/2024/2023 | **Last Reviewed Date:** 12/10/01/2024/2023

The Governing Board recognizes that a well-aligned sequence of courses fosters academic growth and provides for the best possible use of instructional time. The district's course of study shall provide students with opportunities to attain the skills, knowledge, and abilities they need to be successful academically, professionally, and personally.

CSBA NOTE: The following optional paragraph should be revised to reflect the grade levels offered by the district. For example, unified school districts need to be concerned about articulation of courses within the district and with postsecondary institutions, whereas elementary districts and high school districts will need to address articulation with each other.

The Superintendent or designee shall establish processes for ensuring the articulation of courses across grade levels within the district. As necessary, the Superintendent or designee shall work with representatives of appropriate area districts and postsecondary institutions to ensure articulation of courses with other institutions to which district students may matriculate. The sequence of courses shall be designed to ensure that each course provides adequate preparation for the next course in the sequence, only utilizes prerequisites that are essential to success in a given program or course, avoids significant duplication of content, and allows for reinforcement and progression in the subject matter.

CSBA NOTE: OCR's August 2023 Dear Colleague Letter, "Race and School Programming," states that a district may not separate students based on race, but may include group discussions or activities that focus on race as part of the curriculum, courses, or programs so long as access or participation is not permitted or limited based on race. OCR's guidance also provides that a school-sponsored program with emphasis on race, such as a student club, that is open to all students, typically would not violate Title VI solely because of its race-related theme.

The district shall not provide any course separately or require or refuse participation by any student on the basis of the student's actual or perceived sex, sexual orientation, gender, gender expression, gender identity, ethnic group identification, immigration status, race, ancestry, national origin, religion, color, mental or physical disability, age, medical condition, genetic information, marital status, or any other characteristic listed in Education Code 200 and 220, Government Code 11135, or Penal Code 422.55, or the student's association with a person or group with one or more of such actual or perceived characteristics. (Education Code 200, 220; Government Code 11135; Penal Code 422.55; 5 CCR 4940)

Elementary Grades

CSBA NOTE: The following section is for use by districts offering elementary grades and may be revised to reflect district practice. Education Code 51225.4 mandates elementary school districts to certify to the Superintendent of Public Instruction that they have adopted a policy to implement a course of instruction that sufficiently prepares students for the secondary courses required for graduation pursuant to Education Code 51225.3.

The Board shall adopt a course of study for elementary grades that sufficiently prepares students for the secondary course of study.

Secondary Grades

CSBA NOTE: Education Code 51228 requires districts to offer students in grades 7-12 a course of study that fulfills the requirements and prerequisites for admission to California public colleges. Education Code 51228 also requires districts to offer such students the opportunity to attain entry-level employment skills. Pursuant to Education Code 51228, districts that adopt a course of study that meets or exceeds the state model curriculum standards in career technical education will be deemed to have satisfied the requirement.

Education Code 66204 prohibits a public school from establishing any policy or practice that directs any student away from choosing programs that prepare a student academically for college, especially for cultural or linguistic reasons.

The following paragraph is for use by districts maintaining any of grades 7-12 and should be revised to reflect the grade levels offered by the district.

The district shall offer all otherwise qualified students in grades 7-12 a course of study that prepares them, upon graduation from high school, to meet the requirements and prerequisites for admission to California public colleges and universities and to attain entry-level employment skills in business or industry. The district's course of study may provide for a rigorous academic curriculum that integrates academic and career skills, includes applied learning across all disciplines, and prepares all students for high school graduation and career entry. (Education Code 51228)

CSBA NOTE: The remainder of this policy is for use by districts maintaining any of grades 9-12.

In addition, the course of study for students in grades 9-12 shall include instruction in skills and knowledge for adult life, career technical training, and a timely opportunity for all otherwise qualified students to enroll, within four years, in each course necessary to fulfill the requirements and prerequisites for admission to California public colleges and universities prior to graduation. (Education Code 51224, 51228)

CSBA NOTE: Among the criteria for admission to the University of California (UC) or California State University system is a requirement that high school students satisfactorily complete 15 yearlong/30 semesters of specified courses ("~~a-g~~A-G" courses). These include a growing number of career technical education courses that connect knowledge of academic content with practical or work-related applications.

In order to qualify as an "~~a-g~~A-G" course, the course must first be submitted to and approved by UC. Education Code 51229 requires that districts annually provide the list of certified courses to the parents/guardians of students in grades 9-12 ~~and their parents/guardians~~; see the accompanying administrative regulation and E 5145.6 - Parental Notifications.

The Superintendent or designee shall develop a process by which courses that meet California college admission criteria (referred to as "~~a-g~~A-G" course requirements) are submitted to the University of California for review and certification. The Superintendent or designee shall maintain an accurate list of all current high school courses that have been so certified, shall ensure that the list is provided annually to all students in grades 9-12 and their parents/guardians, and shall make updated lists readily available. (Education Code 51229, 66204)

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State	Description
5 CCR 10020	Automobile driver education
5 CCR 10020 10040 -10043	Automobile driver education and training
5 CCR 10060	Criteria for high school physical education programs
5 CCR 430-438	Individual student records
5 CCR 4940	Nondiscrimination; course access
Ed. Code 200	Equal rights and opportunities in state educational institutions
Ed. Code 220	Prohibition of discrimination
Ed. Code 234.1	Student protections relating to discrimination, harassment, intimidation, and bullying
Ed. Code 234.7	Student protections relating to immigration and citizenship status
Ed. Code 242	Access to information about educational laws and policies regarding right to accurate and inclusive curriculum
Ed. Code 33319.3	Driver education; CDE materials on road rage
Ed. Code 33540	Standards for government and civics instruction
Ed. Code 48980	Parent/Guardian notifications
Ed. Code 49060-49079	Student records
Ed. Code 51202	Instruction in personal and public health and safety
Ed. Code 51203	Instruction on alcohol, narcotics, and dangerous drugs
Ed. Code 51204	Course of study designed for student's needs
Ed. Code 51204.5	History of California; contributions of men, women, and ethnic groups History of California; contributions of specified groups
Ed. Code 51210	Course of study for grades 1-6
Ed. Code 51220	Course of study for grades 7-12
Ed. Code 51225.3	High School Graduation Requirements
Ed. Code 51226.7	Model Curriculum in Ethnic Studies
Ed. Code 51241	Temporary two-year or permanent exemption from physical education
Ed. Code 51501	Nondiscriminatory subject matter
Ed. Code 51911-51921	Comprehensive health education
Ed. Code 51925-51929	Mandatory mental health education and in-service training

Ed. Code 51930-51939	California Healthy Youth Act
Ed. Code 51940	Curriculum for brain and spinal cord injury prevention
Ed. Code 60040-60052	Requirements for instructional materials
Ed. Code 66204	Certification of high school courses as meeting university admission criteria
Gov. Code 11135	Prohibition of discrimination
Gov. Code 7282-7282.5	Standards for responding to U.S. Immigration and Customs enforcement holds
Gov. Code 7283-7283.2	Standards for participation in U.S. Immigration and Customs enforcement programs
Gov. Code 7284-7284.12	Cooperation with immigration authorities
H&S Code 11032	Definition of dangerous drugs
Pen. Code 422.55	Definition of hate crime

Federal

20 USC 1232g

34 CFR 99.1-99.67

Description

Family Educational Rights and Privacy Act (FERPA) of 1974

Family Educational Rights and Privacy

Management Resources

[U.S. Department of Education, Office for Dear Colleague Letter: Race and School Programming, August 2023](#)

[\(https://www2.ed.gov/about/offices/list/ocr/letters/colleague-20230824.pdf\)](https://www2.ed.gov/about/offices/list/ocr/letters/colleague-20230824.pdf)

Website

CSBA District and County Office of Education Legal Services

Website

Federal Student Aid

Website

[American Red Cross, Hands-Only CPR Training \(https://www.redcross.org/take-a-class/cpr/performing-cpr/hands-only-cpr\)](https://www.redcross.org/take-a-class/cpr/performing-cpr/hands-only-cpr)

[Website](#)

[American Heart Association](#)

Website

California Student Aid Commission

Website

University of California, A-G Course Submissions

Website

University of California, List of Approved A-G Courses

Website

California Career Resource Network

Website

California State University, Admission Requirements

Website

California Colleges.edu

Website

California Department of Education

Website

CSBA

[Website](#)

[Department of Justice \(https://oag.ca.gov/\)](https://oag.ca.gov/)

Website

Instructional Quality Commission
(<https://www.cde.ca.gov/be/cc/cd/>)

Website

U.S. Department of Education

Cross References

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Regulation 6143: Courses Of Study

Status: ADOPTED

Original Adopted Date: 11/01/2014 | **Last Revised Date:** 12/10/01/2024/2023 | **Last Reviewed Date:** 12/10/01/2024/2023

CSBA NOTE: Education Code requirements for courses of study are generally classified into requirements for grades 1-6 and 7-12. Therefore, K-8 districts and high school districts need to collaborate with appropriate area districts to ensure that all required courses are offered sometime during grades 7-12.

The district should select the sections below ("Grades 1-6" and/or "Grades 7-12") that correspond with the grade levels offered.

[For more information regarding the selection, evaluation, and prohibited use of individual instructional materials, see BP/AR 6161.1 – Selection and Evaluation of Instructional Materials, BP 6161.11 – Supplementary Instructional Materials, and BP 6163.1 – Library Media Centers.](#)

Grades 1-6

CSBA NOTE: Items #1-7 below are areas of study required by law for grades 1-6. The Governing Board may add other studies to this list.

Courses of study for grades 1-6 shall include the following:

1. English: knowledge and appreciation of language and literature, and the skills of speaking, reading, listening, spelling, handwriting, and composition (Education Code 51210)
2. Mathematics: concepts, operational skills, and problem solving (Education Code 51210)
3. Social sciences: age-appropriate instruction drawing upon the disciplines of anthropology, economics, geography, history, political science, psychology, and sociology, including instruction in:
 - a. The history, resources, development, and government of California and the United States

[CSBA NOTE: Education Code 51204.5 requires instruction in social sciences to include a study of the role and contributions of specified groups of people to the economic, political, and social development of California and the United States of America, which, as amended by AB 1078 \(Ch. 229, Statutes of 2023\), includes people of all genders \(formerly “men and women”\), Latino Americans \(formerly “Mexican Americans”\), LGBTQ+ Americans \(formerly “lesbian, gay, bisexual, and transgender Americans”\), and members of other ethnic, cultural, religious, and socioeconomic status groups \(formerly “ethnic and cultural”\). The complete list required by Education Code 51204.5, as amended by AB 1078, is reflected below.](#)

[Additionally, Education Code 60040, which requires the Board to only adopt instructional materials that in its determination accurately portray the cultural and](#)

racial diversity of our society, was amended by AB 1078 to mirror the changes made to Education Code 51204.5, explained above.

Instruction shall include the early history of California and a study of the role and contributions of ~~men and women~~ people of all genders, Native Americans, African Americans, ~~Mexican~~ Latino Americans, Asian Americans, Pacific Islanders, European Americans, ~~lesbian, gay, bisexual, and transgender~~ LGBTQ+ Americans, persons with disabilities, and members of other ethnic ~~and~~ cultural, religious, and socioeconomic status groups to the economic, political, and social development of California and the United States, with particular emphasis on portraying the role of these groups in contemporary society. (Education Code 51204.5, 60040)

- b. The development of the American economic system, including the role of the entrepreneur and labor
 - c. The relations of persons to their human and natural environments
 - d. Eastern and western cultures and civilizations
 - e. Contemporary issues
 - f. The wise use of natural resources
4. Science: biological and physical aspects, with emphasis on experimental inquiry and the place of humans in ecological systems (Education Code 51210)
5. Visual and performing arts: instruction in dance, music, theatre, and visual arts aimed at developing aesthetic appreciation and creative expression (Education Code 51210)

CSBA NOTE: Education Code 51202 requires that certain health-related topics be addressed at "the appropriate elementary and secondary grade levels" during grades K-12. Districts may revise ITEM #6a-e below to indicate topics that will be addressed in grades K-6.

Education Code 51203 requires the Board to adopt regulations specifying the grade(s) and course(s) in which drug and alcohol education will be given. For language fulfilling this mandate, see AR 5131.6 - Alcohol and Other Drugs.

6. Health: principles and practices of individual, family, and community health, including instruction at the appropriate grade levels and subject areas in: (Education Code 51202, 51210)
- a. Personal and public safety and accident prevention, including instruction in emergency first aid, hemorrhage control, treatment for poisoning, resuscitation techniques, and cardiopulmonary resuscitation (CPR) when appropriate equipment is available

- b. Fire prevention
- c. The protection and conservation of resources, including the necessity for the protection of the environment
- d. Venereal disease
- e. The effects of alcohol, narcotics, drugs, and tobacco upon the human body

CSBA NOTE: The following item is optional pursuant to Education Code 51202.

- f. Violence as a public health issue

CSBA NOTE: Education Code 51925 requires districts that offer a health education course to middle school students to include mental health instruction, as specified in Item #6g. Districts that offer a health education course to students in grade 6, and for which grade 6 is part of a middle school program, should include Item #6g. Districts that offer mental health instruction to any other elementary grade level(s) or for which grade 6 is not part of the middle school program, may delete or revise Item #6g, as appropriate.

Education Code 51929 requires the California Department of Education (CDE) to develop a plan to expand mental health instruction, and has created a webinar, "Student Mental Health Education Implementation: Why, What & How," available on its website.

- g. Mental Health, that provides for reasonably designed instruction on the overarching themes and core principles of mental health, which includes: (Education Code 51925)
 - i. Defining the signs and symptoms of common mental health challenges
 - ii. Explaining evidence-based services and supports that effectively help individuals manage mental health challenges
 - iii. Promoting mental health wellness and protective factors, including positive development, social and cultural connectedness and supportive relationships, resiliency, problem solving skills, coping skills, self-esteem, and a positive school and home environment in which students feel comfortable
 - iv. Identifying warning signs of common mental health problems in order to promote awareness and early intervention so that students know to take action before a situation turns into a crisis, including how to obtain assistance from the district or the community for themselves or others and evidence-based and culturally responsive practices that are proven to help overcome mental health challenges
 - v. Connecting the importance of mental health to overall health and academic success and to co-occurring conditions, such as chronic physical conditions, chemical dependence, and substance abuse

- vi. Conveying an awareness and appreciation about the prevalence of mental health challenges across all populations, races, ethnicities, and socioeconomic statuses, including the impact of race, ethnicity, and culture on the experience and treatment of mental health challenges
- vii. Understanding the stigma surrounding mental health challenges and what can be done to overcome stigma, increase awareness, and promote acceptance, including, to the extent possible, classroom presentations of narratives by trained peers and other individuals who have experienced mental health challenges and how they coped with their situations, including how they sought help and acceptance

Mental health instruction offered by the district shall: (Education Code 51926)

1. Be appropriate for use with students of all races, genders, sexual orientations, ethnic and cultural backgrounds, students with disabilities, and English learners
2. Be accessible to students with disabilities, including, but not limited to, providing a modified curriculum, materials, and instruction in alternative formats, and auxiliary aids
3. Not reflect or promote bias against any person on the basis of any category protected by Education Code 220
4. Be coordinated with any existing on-campus mental health providers including, but not limited to, providers with a pupil personnel services credential, who may be immediately called upon by students for assistance

Students receiving mental health instruction shall not be required to disclose their confidential health or mental health information at any time in the course of receiving the instruction. (Education Code 51927)

7. Physical education: with emphasis on physical activities conducive to health and vigor of body and mind (~~Education Code 51210~~)

CSBA NOTE: Item #8 below is optional. Education Code 51210.5 authorizes age-appropriate instruction on violence awareness and prevention within any area of study listed in items #1-7 above. Pursuant to Education Code 51210.5, such instruction may include personal testimony in the form of oral or video histories that illustrate the economic and cultural effects of violence within a city, the state, and the country. See BP 6142.94 - History-Social Science Instruction.

8. Violence awareness and prevention

CSBA NOTE: Optional item #9 below is not required by state law but is a highly recommended component of school-to-career instruction.

9. Career awareness exploration

Grades 7-12

CSBA NOTE: Items #1-11 below are areas of study required by law for grades 7-12. The Board may add other studies to this list.

Courses of study for grades 7-12 shall include the following:

1. English: knowledge and appreciation of literature, language, and composition, and the skills of reading, listening, and speaking (Education Code 51220)
2. Social sciences: age-appropriate instruction drawing upon the disciplines of anthropology, economics, geography, history, political science, psychology, and sociology, with instruction in: (Education Code 51220)
 - a. The history, resources, development, and government of California and the United States, including instruction in:

CSBA NOTE: Education Code 51204.5 requires instruction in social sciences to include a study of the role and contributions of specified groups of people to the economic, political, and social development of California and the United States of America, which, as amended by AB 1078, includes people of all genders (formerly "men and women"), Latino Americans (formerly "Mexican Americans"), LGBTQ+ Americans (formerly "lesbian, gay, bisexual, and transgender Americans"), and members of other ethnic, religious, cultural, and socioeconomic status groups (formerly "ethnic and cultural"). The complete list required by Education Code 51204.5, as amended by AB 1078, is reflected below.

Additionally, Education Code 60040, which requires the Board to only adopt instructional materials that in its determination accurately portray the cultural and racial diversity of our society, was amended by AB 1078 to mirror the changes made to Education Code 51204.5, explained above.

- i. The early history of California and a study of the role and contributions of ~~both men and women~~ people of all genders, Native Americans, African Americans, ~~Mexican~~ Latino Americans, Asian Americans, Pacific Islanders, European Americans, ~~lesbian, gay, bisexual, and transgender~~ LGBTQ+ Americans, persons with disabilities, and members of other ethnic ~~and~~ cultural, religious, and socioeconomic status groups to the economic, political, and social development of California and the United States, with particular emphasis on portraying the role of these groups in contemporary society (Education Code 51204.5, 60040)

CSBA NOTE: Education Code 51221.3 and 51221.4 encourage, but do not require, instruction on the topics described in optional subitems #(2)-(4) below. These items may be modified or deleted to reflect district practice.

For districts that choose to offer such instruction, Education Code 51221.3 and 51221.4 encourage that a component be drawn from personal testimony, especially in the form of oral or video history. If oral histories are used, they must conform to the requirements of Education Code 51221.3 and 51221.4. See BP 6142.94 - History-Social Science Instruction.

- ii. World War II, including the role of Americans and Filipino Americans who served in the United States Army during that time

iii. The Vietnam War, including the "Secret War" in Laos and role of Southeast Asians in that war

iv. The Bracero program, in which there was a 1942 agreement between the United States and Mexico authorizing the temporary migration of laborers to the United States

b. The American legal system, the operation of the juvenile and adult criminal justice systems, and the rights and duties of citizens under the criminal and civil law and the state and federal constitutions

CSBA NOTE: The following optional paragraph is for use by districts that offer a teen court or peer court program.

c. The development of the American economic system, including the role of the entrepreneur and labor

d. The relations of persons to their human and natural environments, including the wise use of natural resources (Education Code 51221)

e. Eastern and western cultures and civilizations

CSBA NOTE: Pursuant to Education Code 51220, instruction related to human rights issues, as provided in ~~item~~ **Item** #2f below, may include the study of the Armenian genocide. Education Code 51226.3 encourages the incorporation of oral testimony into instruction in human rights, the Holocaust, and genocide, including the Armenian, Cambodian, Darfur, and Rwandan genocides.

f. Human rights issues, with particular attention to the study of the inhumanity of genocide ~~{~~, which may include, but is not limited to, the Armenian, Cambodian, Darfur, and Rwandan genocides~~}~~, slavery, and the Holocaust

g. Contemporary issues

3. World language(s): understanding, speaking, reading, and writing, beginning not later than grade 7 (Education Code 51220)

4. Physical education: with emphasis on physical activities conducive to health and vigor of body and mind, as required by Education Code 51222 (Education Code 51220)

5. Science: physical and biological aspects; emphasis on basic concepts, theories, and processes of scientific investigation and on the place of humans in ecological systems;

appropriate applications of the interrelation and interdependence of the sciences (Education Code 51220)

6. Mathematics: mathematical understandings, operational skills, and problem-solving procedures; algebra (Education Code 51220, 51224.5)
7. Visual and performing arts: dance, music, theatre, and visual arts, with emphasis upon development of aesthetic appreciation and creative expression (Education Code 51220)
8. Applied arts: consumer education, family and consumer sciences education, industrial arts, general business education, or general agriculture (Education Code 51220)
9. Career technical/vocational-technical education: in the occupations and in the numbers appropriate to the personnel needs of the state and community served and relevant to the career desires and needs of students (Education Code 51220)

CSBA NOTE: Education Code 51934 requires that students be provided comprehensive sexual health and HIV prevention instruction at least once in middle school or junior high school and at least once in high school. See BP/AR 6142.1 - Sexual Health and HIV/AIDS Prevention Instruction for required components of such instruction.

10. Comprehensive sexual health and HIV prevention (Education Code 51225.36, 51934)

CSBA NOTE: Education Code 51202 requires that certain health-related topics be addressed at "the appropriate elementary and secondary grade levels" during grades K-12. Districts may revise item #11 below to indicate topics that will be addressed in grades 7-12.

Education Code 51203 requires the Board to adopt regulations specifying the grade(s) and course(s) in which drug and alcohol education will be given. For language fulfilling this mandate, see AR 5131.6 - Alcohol and Other Drugs.

11. Personal and public safety, accident prevention and health, including instruction in: (Education Code 51202, 51203)

- a. Emergency first aid, hemorrhage control, treatment for poisoning, resuscitation techniques, and CPR when appropriate equipment is available

CSBA NOTE: The following paragraph is for use by districts that require a course in health education for high school graduation; see BP 6146.1 - High School Graduation Requirements. Pursuant to Education Code 51225.6, such districts are required to include instruction in performing compression-only cardiopulmonary resuscitation (CPR), as described below. Such instruction must be based on national evidence-based emergency cardiovascular care guidelines for the performance of compression-only CPR, such as those developed by the American Heart Association or the American Red Cross, and must include hands-on practice in compression-only CPR. [On its web site, the California Department of Education](#) [On its website, CDE](#) provides guidance on how to implement this requirement.

Education Code 51225.6 also encourages districts to provide students with general information on the use and importance of an automated external defibrillator.

Instruction shall be provided in compression-only CPR based on national guidelines and shall include hands-on practice. (Education Code 51225.6)

- b. Fire prevention
- c. The protection and conservation of resources, including the necessity for the protection of the environment
- d. Venereal disease
- e. The effects of alcohol, narcotics, drugs, and tobacco upon the human body

CSBA NOTE: The following two items are optional pursuant to Education Code 51202.

- f. Prenatal care for pregnant individuals
- g. Violence as a public health issue

CSBA NOTE: Item #12 is optional. Education Code 51220.3 authorizes age-appropriate instruction on violence awareness and prevention within any area of study listed above for grades 7-12.

12. Violence awareness and prevention

CSBA NOTE: Pursuant to Education Code 51226.7, the State Board of Education ([SBE](#)) has adopted a model curriculum in ethnic studies upon which districts may offer an elective course in social sciences or English language arts in at least one year during grades 9-12.

Subject to funding in the annual Budget Act or other statute, Education Code 51225.3, as

amended by AB 101 (Ch. 661, Statutes of 2021), requires a one-semester course in ethnic studies for high school graduation beginning with students who graduate in the 2029-30 school year.

At its discretion, a district may require a full-year course. Districts that require a full-year course should revise Item #13 accordingly. A student who completes a course in ethnic studies will also accrue credit for coursework in the subject that the course is offered, including, if applicable, credit towards satisfying a course required for graduation.

Item #13 is currently optional, but, if funding is appropriated, districts will be required to offer a one-semester ethnic studies course, as specified, beginning in the 2025-26 school year.

13. Ethnic studies

Commencing in the 2025-26 school year, the district shall offer a one-semester course in ethnic studies as specified in Education Code 51225.3.

CSBA NOTE: Education Code 51220.5 requires the equivalent content of a one-semester course in parenting skills and education in grade 7 and/or 8, subject to funding which was not subsequently appropriated; thus the following paragraph is currently optional.

CSBA NOTE: The following paragraph is for use by districts that maintain high schools.

High schools shall offer automobile driver education that includes instruction in: (Education Code 51220, 51220.1, 51220.4)

1. Vehicle Code provisions and other relevant state laws
2. Proper acceptance of personal responsibility in traffic
3. Appreciation of the causes, seriousness, and consequences of traffic accidents
4. Knowledge and attitudes necessary for the safe operation of motor vehicles
5. The safe operation of motorcycles
6. The dangers involved in consuming alcohol or drugs in connection with the operation of a motor vehicle
7. The rights and duties of a motorist as they pertain to pedestrians and the rights and duties of pedestrians as they pertain to traffic laws and traffic safety

Certification of College Preparatory Courses

CSBA NOTE: The following optional section is for use by districts that maintain grades 9-12 and may be revised to reflect district practice. Among the criteria for admission to the University of California (UC) or California State University (CSU) system is a requirement that students satisfactorily complete 15 yearlong/30 semesters of specified courses ("a-gA-G" courses). In order to qualify as an "a-gA-G" course, the course must first be submitted to and approved by UC. The district or school should develop course descriptions using the templates provided by UC and submit them through UC's online system.

Education Code 51225.37 encourages districts that offer world language courses specifically designed for native speakers to submit those courses to UC for certification and addition to the school's "a-gA-G" course list.

The following paragraph may be revised to reflect the position in the district or school(s) that is responsible for submitting and updating "a-gA-G" courses.

The Superintendent or designee shall identify district courses that may qualify for designation as "a-gA-G" college preparatory courses, including courses in history-social science, English, mathematics, laboratory science, languages other than English, visual and performing arts, career technical education, and college preparatory electives. The Superintendent or designee shall submit any necessary information regarding each identified course to the University of California (UC) for "a-gA-G" designation.

Notification and Information to Students in Grades 9-12

CSBA NOTE: The following section is for use by districts that maintain grades 9-12.

At the beginning of each school year, the Superintendent or designee shall provide written notice to parents/guardians of students in grades 9-12 that, to the extent possible, shall not exceed one page in length and that includes all of the following: (Education Code 51229)

1. A brief explanation of the course requirements for admission to UC and the California State University (CSU)

CSBA NOTE: The UC maintains a searchable ~~web site~~ [website](#) that lists certified "a-gA-G" courses for all regular California public high schools.

2. A list of the current UC and CSU ~~web sites~~ [websites](#) that help students and their families learn about college admission requirements and that list high school courses that have been certified by UC as satisfying the requirements for admission to UC and CSU
3. A brief description of what career technical education is, as defined by the California Department of Education (CDE)
4. The Internet address for the portion of the ~~CDE web site~~ [CDE's website](#) where students can learn more about career technical education
5. Information about how students may meet with school counselors to help them choose courses that will meet college admission requirements and/or enroll in career technical education courses

CSBA NOTE: Education Code 51225.8 requires districts to provide specified information on how to properly complete and submit the Free Application for Federal Student Aid (FAFSA) or the California Dream Act Application (CADAA), as appropriate, at least once before grade 12. At the district's discretion, the information provided may be disseminated through in-class instruction, an existing program, family information sessions, group or individual sessions with school counselors, or other appropriate means.

The Superintendent or designee shall provide information to students and parents/guardians regarding the completion and submission of the Free Application for Federal Student Aid (FAFSA) and/or the California Dream Act Application (CADAA) at least once before grade 12. (Education Code 51225.8)

Financial Aid Requirements for Students in Grade 12

CSBA NOTE: Pursuant to Education Code 51225.7, as added by AB 132 (Ch. 144, Statutes of 2021), starting in the 2022-23 school year, the district is required to confirm that each student in grade 12 completes and submits a FAFSA to the U.S. Department of Education and/or, if a student is exempt from paying nonresident tuition, a CADAA to the Student Aid Commission (CSAC), unless there is an exception as specified below.

To enable educators to ensure that each student has successfully completed and submitted a FAFSA or CADAA, Education Code 51225.7, as amended by SB 114 (Ch. 48, Statutes of 2023), requires CSAC to provide data to the California College Guidance Initiative to inform reports available through CaliforniaColleges.edu.

Pursuant to Education Code 51225.7, as added by AB 132, CSAC is required to, by July 1, 2022, adopt CSAC adopted regulations, available on its website, that include model opt-out forms and acceptable use policies for the purpose of providing guidance on the protection of student and parent/guardian data, which will be available on CSAC's web site.

Commencing in the 2022-23 school year, the Superintendent or designee shall ensure that each student in grade 12 completes and submits a FAFSA to the U.S. Department of Education or, if a student is exempt from paying nonresident tuition, a CADAA to the Student Aid Commission (CSAC), unless either: (Education Code 51225.7)

1. The student's parent/guardian, emancipated minor, or student age 18 years or older submits an opt-out form to the district
2. If the district determines that a student is unable to complete a requirement of Education Code 51225.7, the district shall exempt the student or the student's parent/guardian from completing the FAFSA, CADAA, or opt-out form and shall complete and submit an opt-out form on the student's behalf

CSBA NOTE: Pursuant to Education Code 51225.7, as added by AB 132, the district shall ensure that each high school student in Grade 12, and if applicable, the student's parent/guardian, is directed to any support and assistance necessary to complete the FAFSA and/or CADAA, as described below.

The Superintendent or designee shall ensure that each high school student in grade 12, and if applicable, the student's parent/guardian, be directed to any support and assistance necessary to complete the FAFSA and/or CADAA that may be available through outreach programs, including, but not limited to, programs operated by CSAC, postsecondary immigration resource centers, college readiness organizations, community-based organizations, and/or legal resource organizations. (Education Code 51225.7)

Information shared by students and parents/guardians in completing and submitting the FAFSA and/or CADAA shall be handled in compliance with the federal Family Rights and Privacy Act and applicable state law, regardless of any person's immigration status or other personal information. (Education Code 51225.7)

Policy Reference UPDATE Service

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Policy Reference Disclaimer:

These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State	Description
<u>5 CCR 10020</u>	<u>Automobile driver education</u>
5 CCR 10020 <u>10040</u> -10043	Automobile driver education and training
5 CCR 10060	Criteria for high school physical education programs
5 CCR 430-438	Individual student records
5 CCR 4940	Nondiscrimination; course access
Ed. Code 200	Equal rights and opportunities in state educational institutions
Ed. Code 220	Prohibition of discrimination
Ed. Code 234.1	Student protections relating to discrimination, harassment, intimidation, and bullying
<u>Ed. Code 234.7</u>	<u>Student protections relating to immigration and citizenship status</u>
Ed. Code <u>242</u>	<u>Access to information about educational laws and policies regarding right to accurate and inclusive curriculum</u>
Ed. Code 33319.3	Driver education; CDE materials on road rage
Ed. Code 33540	Standards for government and civics instruction
Ed. Code 48980	Parent/Guardian notifications
Ed. Code 49060-49079	Student records
Ed. Code 51202	Instruction in personal and public health and safety
Ed. Code 51203	Instruction on alcohol, narcotics, and dangerous drugs
Ed. Code 51204	Course of study designed for student's needs
Ed. Code 51204.5	History of California; contributions of men, women, and ethnic groups <u>History of California; contributions of specified groups</u>
Ed. Code 51210	Course of study for grades 1-6
Ed. Code 51220	Course of study for grades 7-12

Ed. Code 51225.3	High School Graduation Requirements
Ed. Code 51226.7	Model Curriculum in Ethnic Studies
Ed. Code 51241	Temporary two-year or permanent exemption from physical education
Ed. Code 51501	Nondiscriminatory subject matter
Ed. Code 51911-51921	Comprehensive health education
Ed. Code 51925-51929	Mandatory mental health education and in-service training
Ed. Code 51930-51939	California Healthy Youth Act
Ed. Code 51940	Curriculum for brain and spinal cord injury prevention
Ed. Code 60040-60052	Requirements for instructional materials
Ed. Code 66204	Certification of high school courses as meeting university admission criteria
Gov. Code 11135	Prohibition of discrimination
Gov. Code 7282-7282.5	Standards for responding to U.S. Immigration and Customs enforcement holds
Gov. Code 7283-7283.2	Standards for participation in U.S. Immigration and Customs enforcement programs
Gov. Code 7284-7284.12	Cooperation with immigration authorities
H&S Code 11032	Definition of dangerous drugs
Pen. Code 422.55	Definition of hate crime
Federal	Description
20 USC 1232g	Family Educational Rights and Privacy Act (FERPA) of 1974
34 CFR 99.1-99.67	Family Educational Rights and Privacy
Management Resources	Description
U.S. Department of Education, Office for Civil Rights Publication	Dear Colleague Letter: Race and School Programming, August 2023 (https://www2.ed.gov/about/offices/list/ocr/letters/colleague-20230824.pdf)
Website	CSBA District and County Office of Education Legal Services
Website	Federal Student Aid
Website	American Red Cross, Hands-Only CPR Training (https://www.redcross.org/take-a-class/cpr/performing-cpr/hands-only-cpr)
Website	American Heart Association
Website	California Student Aid Commission
Website	University of California, A-G Course Submissions
Website	University of California, List of Approved A-G Courses

Website	California Career Resource Network
Website	California State University, Admission Requirements
Website	California Colleges.edu
Website	California Department of Education
Website	CSBA
Website	Department of Justice (https://oag.ca.gov/)
Website	Instructional Quality Commission (https://www.cde.ca.gov/be/cc/cd/)
Website	U.S. Department of Education

Cross References

Code	Description
0410	Nondiscrimination in District Programs and Activities
0415	Equity
0460	Local Control And Accountability Plan
0460	Local Control And Accountability Plan
1312.2	Complaints Concerning Instructional Materials
1312.4	Williams Uniform Complaint Procedures
1340	Access To District Records
1340	Access To District Records
3270	Sale And Disposal Of Books, Equipment And Supplies
3270	Sale And Disposal Of Books, Equipment And Supplies
3513.3	Tobacco-Free Schools
3513.3	Tobacco-Free Schools
5022	Student And Family Privacy Rights
5022	Student And Family Privacy Rights
5121	Grades/Evaluation Of Student Achievement
5121	Grades/Evaluation Of Student Achievement
5125	Student Records
5125	Student Records
5126	Awards For Achievement
5126	Awards For Achievement
5131.6	Alcohol And Other Drugs
5131.6	Alcohol And Other Drugs

5138	Conflict Resolution/Peer Mediation
5141.4	Child Abuse Prevention And Reporting
5141.4	Child Abuse Prevention And Reporting
5145.13	Response To Immigration Enforcement
5145.13	Response To Immigration Enforcement
5145.3	Nondiscrimination/Harassment
5145.3	Nondiscrimination/Harassment
5145.6	Parent/Guardian Notifications
5145.6-E(1)	Parent/Guardian Notifications
5146	Married/Pregnant/Parenting Students
6000	Concepts And Roles
6011	Academic Standards
6141	Curriculum Development And Evaluation
6141	Curriculum Development And Evaluation
6141.2	Recognition Of Religious Beliefs And Customs
6141.2	Recognition Of Religious Beliefs And Customs
6141.4	International Baccalaureate Program
6141.5	Advanced Placement
6142.1	Sexual Health And HIV/AIDS Prevention Instruction
6142.1	Sexual Health And HIV/AIDS Prevention Instruction
6142.2	World Language Instruction
6142.2	World Language Instruction
6142.3	Civic Education
6142.4	Service Learning/Community Service Classes
6142.5	Environmental Education
6142.6	Visual And Performing Arts Education
6142.7	Physical Education And Activity
6142.7	Physical Education And Activity
6142.8	Comprehensive Health Education
6142.8	Comprehensive Health Education
6142.91	Reading/Language Arts Instruction
6142.92	Mathematics Instruction
6142.93	Science Instruction

6142.94	History-Social Science Instruction
6144	Controversial Issues
6145	Extracurricular And Cocurricular Activities
6145	Extracurricular And Cocurricular Activities
6145.8	Assemblies And Special Events
6146.1	High School Graduation Requirements
6146.11	Alternative Credits Toward Graduation
6146.11	Alternative Credits Toward Graduation
6146.3	Reciprocity Of Academic Credit
6146.3	Reciprocity Of Academic Credit
6146.5	Elementary/Middle School Graduation Requirements
6151	Class Size
6152.1	Placement In Mathematics Courses
6152.1	Placement In Mathematics Courses
6153	School-Sponsored Trips
6153	School-Sponsored Trips
6155	Challenging Courses By Examination
6155	Challenging Courses By Examination
6158	Independent Study
6158	Independent Study
6159	Individualized Education Program
6159	Individualized Education Program
6161.1	Selection And Evaluation Of Instructional Materials
6161.1	Selection And Evaluation Of Instructional Materials
6161.1-E(1)	Selection And Evaluation Of Instructional Materials
<u>6161.11</u>	<u>Supplementary Instructional Materials</u>
<u>6163.1</u>	<u>Library Media Centers</u>
6164.2	Guidance/Counseling Services
6172.1	Concurrent Enrollment In College Classes
6172.1	Concurrent Enrollment In College Classes
6173	Education For Homeless Children
6173	Education For Homeless Children
6173-E(1)	Education For Homeless Children

6173-E(2)	Education For Homeless Children
6173.2	Education Of Children Of Military Families
6173.2	Education Of Children Of Military Families
6173.3	Education For Juvenile Court School Students
6177	Summer Learning Programs
6178	Career Technical Education
6178	Career Technical Education
6178.1	Work-Based Learning
6178.1	Work-Based Learning
6181	Alternative Schools/Programs Of Choice
6181	Alternative Schools/Programs Of Choice
6184	Continuation Education
6184	Continuation Education

Policy 6161.1: Selection And Evaluation Of Instructional Materials

Status: ADOPTED

Original Adopted Date: 11/01/2011 | **Last Revised Date:** 10/01/2020**2023** | **Last Reviewed Date:** 10/01/2020**2023**

CSBA NOTE: Pursuant to Education Code 60200 and 60400, the Governing Board is responsible for the adoption of textbooks and other instructional materials, as defined in Education Code 60010, for use in district schools. See the accompanying administrative regulation for required and optional criteria for the selection of instructional materials. See BP 6161.11 - Supplementary Instructional Materials and BP 6163.1 - Library Media Centers for selection processes regarding supplementary [books and](#) materials.

[For more information, the California Department of Education's \(CDE\) website provides guidance on the removal of instruction or instructional materials. In addition, Education Code 60040.5, as added by AB 1078 \(Ch. 229, Statutes of 2023\), requires CDE to issue, by July 1, 2025, guidance regarding how to review instructional materials to ensure that they represent diverse perspectives and are culturally relevant. Additionally, Education Code 242, as added by AB 1078, requires CDE to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum.](#)

The Governing Board desires that district instructional materials, as a whole, present a broad spectrum of knowledge and viewpoints, [accurately](#) reflect and value society's diversity, [stimulate thought, the exploration of ideas and intellectual exchanges](#), and enhance instructors' ability to educate all students through the use of multiple teaching strategies and technologies. The Board shall adopt instructional materials based on a determination that such materials are an effective learning resource to help students achieve grade-level competency and that the materials meet criteria specified in law. Textbooks, technology-based materials, and other educational materials shall be aligned with academic content standards and the district's curriculum to ensure that they effectively support the district's adopted courses of study.

CSBA NOTE: The following paragraph is for use by districts that maintain any of grades K-8 and may be revised to reflect the grade levels offered by the district. Pursuant to Education Code 60200, the State Board of Education (SBE) is required to adopt basic instructional materials in specified subjects that districts may select for use in grades K-8. Education Code 60200 provides that the SBE may adopt materials in any of the specified subject areas at least once, but not more than twice, every eight years. Education Code 60210 authorizes the Board to select materials that have not been approved by SBE, provided they are aligned with state academic content standards or Common Core State Standards.

The Board shall select instructional materials for use in grades K-8 that have been approved by the State Board of Education (SBE) or that have, during the district's review process, been determined to be aligned with the state academic content standards adopted by SBE, [which includes instructional materials for mathematics and English language arts that are aligned to Common Core State Standards](#). (Education Code 60200, 60210)

CSBA NOTE: The following paragraph is for use by districts that maintain high schools.

The Board shall adopt instructional materials for grades 9-12 upon determining that the materials meet the criteria specified in law and the accompanying administrative regulation. (Education Code 60400)

In selecting or adopting instructional materials, the Board shall consider the recommendation of the Superintendent or designee and/or an advisory committee established to review the materials.

Public Hearing on Sufficiency of Instructional Materials

The degree to which every student has sufficient access to standards-aligned instructional materials shall be included in the district's local control and accountability plan. (Education Code 52060)

Sufficiency of Instructional Materials and Public Hearing

CSBA NOTE: As a condition of receiving funds for instructional materials from any state source, Education Code 60119 requires the Board to annually hold a public hearing to determine whether each student in the district has sufficient standards-aligned textbooks or instructional materials in English/language arts (including English language development), mathematics, science, and history-social science that are consistent with the content and cycles of the curriculum framework adopted by SBE. As clarified in the California Department of Education's (CDE) CDE's "Instructional Materials FAQ," state funding sources for instructional materials include local control funding formula funds and Proposition 20 (2000) lottery funds. Pursuant to Education Code 60119, the Board must also make a written determination during the hearing as to the sufficiency of textbooks or instructional materials in world language and health courses, as well as the availability of science laboratory equipment in science laboratory courses.

Pursuant to Education Code 60010, as amended by SB 820 (Ch. 110, Statutes of 2020), "technology-based materials" include the electronic equipment required to make use of those materials, including, but not limited to, laptop computers and devices that provide Internet access. Thus, when districts provide technology-based materials to students, such equipment is subject to the determination of sufficiency pursuant to Education Code 60119.

Education Code 1240 requires the County Superintendent of Schools to review the textbooks and instructional materials of underperforming schools and, if the County Superintendent determines that a school does not have sufficient materials, to prepare a report outlining the noncompliance and give the district a chance to remedy the deficiency. If the deficiency is not remedied by the second month of the school year, the County Superintendent may request that CDE purchase textbooks or materials for the district, and the cost must be repaid by the district. CDE will issue a public statement at an SBE meeting indicating the district's failure to provide instructional materials.

The Board shall annually conduct one or more public hearings on the sufficiency of the district's instructional materials, including textbooks, technology-based materials, other educational materials, and tests. Technology-based materials include, but are not limited to, software programs, video disks, compact disks, optical disks, video and audio tapes, lesson plans, databases, and the electronic equipment required to make use of those materials by students and teachers as a learning resource. (Education Code 60010, 60119)

CSBA NOTE: Education Code 60119 specifies that the hearing must be held within eight weeks of the beginning of the school year. Pursuant to Education Code 60119, for a district that operates schools on a multitrack, year-round calendar, the timeline begins with the first day students attend school in any track that begins in August or September.

The hearing shall be held on or before the end of the eighth week from the first day students attend school for that year. (Education Code 60119)

The Board encourages participation by parents/guardians, teachers, interested community members, and bargaining unit leaders at the hearing. Ten days prior to the hearing, the Superintendent or designee shall post a notice in three public places within the district containing the time, place, and purpose of the hearing. The hearing shall not take place during or immediately following school hours. (Education Code 60119)

CSBA NOTE: Education Code 60119 requires the Board to adopt a resolution indicating whether ~~or not~~ each student in each school has sufficient standards-aligned textbooks or instructional materials for the subjects specified in ~~items~~Items #1-6 below. See the accompanying Exhibit for a sample resolution.

At the hearing(s), the Board shall determine, through a resolution, whether each student in each school, including each English learner, has sufficient textbooks and/or other instructional materials that are aligned to the content standards adopted by SBE and consistent with the content and cycles of the curriculum framework adopted by SBE in each of the following subjects: (Education Code 60119)

1. Mathematics
2. Science
3. History-social science
4. English language arts, including the English language development component of an adopted program
5. World language
6. Health

CSBA NOTE: The following paragraph is for use by districts that maintain any of grades 9-12.

The Board shall also determine the availability of science laboratory equipment, as applicable to science laboratory courses offered in grades 9-12. (Education Code 60119)

In making these determinations, the Board shall consider whether each student has sufficient textbooks or other instructional materials to use in class and to take home. This does not require that each student have two sets of materials. However, materials shall not be considered sufficient if they are photocopied sheets from only a portion of a textbook or instructional materials copied to address a shortage. (Education Code 60119)

If materials are in a digital format, they shall be considered sufficient as long as each student, at a minimum, has and can access the same materials in the class and to take home as all other students in the same class or course in the district, and has the ability to use and access them at home. (Education Code 60119)

CSBA NOTE: Pursuant to Education Code 60119, if the Board ~~makes a determination~~determines, by resolution, that there are insufficient textbooks or other instructional materials, the Board must take action to ensure that the materials are provided within two months of the beginning of the school year. Education Code 60119, as amended by AB 1078, requires the Board to submit a copy of the resolution to the County Superintendent no later than three business days. CDE's, "Instructional Materials FAQ," states that, if a district has submitted purchase orders to the publisher to purchase materials to remedy the insufficiency, these materials should be received and made available to students by the end of the second month of the school year. Thus, districts

are strongly encouraged to hold the public hearing as early in the school year as possible in order to provide sufficient time to correct any deficiencies.

Pursuant to Education Code 1240, the County Superintendent conducts annual reviews of certain schools to determine, among other things, whether there are insufficient textbooks or instructional materials. Upon making such a determination, the County Superintendent is required to provide the district the opportunity to remedy the deficiency and ensure that the deficiency is remedied no later than the second month of the school term. If the deficiency is not remedied, Education Code 1240 requires the County Superintendent to request CDE to purchase the textbooks or instructional materials, the cost of which must be repaid by the district. CDE will issue a public statement at an SBE meeting indicating the Superintendent's and Board's failure to provide instructional materials. Additionally, Education Code 1240, as amended by AB 1078, requires the County Superintendent to take the actions specified above when the County Superintendent determines that there are insufficient textbooks or instructional materials based on (1) the Board's resolution, (2) the district's quarterly complaints report provided to the County Superintendent in accordance with Education Code 35186, or (3) an audit exception found in accordance with Education Code 41020.

Pursuant to Education Code 60150, as added by AB 1078, if the Superintendent of Public Instruction (SPI) finds that a district has not provided sufficient textbooks or instructional materials as required, CDE is required to take all remedial actions as specified in Education Code 1240, including purchasing textbooks and instructional materials. Additionally, the SPI will assess a financial penalty against the district's local control funding formula allocation.

If the Board determines that there are insufficient textbooks or other instructional materials, the ~~district~~Board shall, by resolution, provide information to classroom teachers and to the public setting forth, for each school in which an insufficiency exists, the percentage of students who lack sufficient standards-aligned textbooks or instructional materials in each subject area and the reasons that each student does not have sufficient textbooks and/or instructional materials. The Board shall submit a copy of the resolution to the County Superintendent of Schools no later than three business days after the hearing. The Board shall take any action to ensure that each student has sufficient materials within two months of the beginning of the school year in which the determination is made. (~~Education Code 60119~~) (Education Code 60119)

~~The degree to which every student has sufficient access to standards-aligned instructional materials shall be included in the district's local control and accountability plan. (Education Code 52060)~~

Complaints

Complaints concerning instructional materials shall be handled in accordance with BP/AR 1312.2 - Complaints Concerning Instructional Materials or AR 1312.4 - Williams Uniform Complaint Procedures, as applicable

In addition, if the County Superintendent, in accordance with Education Code 1240, makes the district aware of a school that does not have sufficient textbooks or instructional materials, the district shall take any action to ensure that each student has sufficient materials within two months of the beginning of the school year.

Prohibition Against Refusal to Approve or Prohibit the Use of Specified Instructional Materials

CSBA NOTE: Education Code 243, as added by AB 1078, clarifies when it is unlawful discrimination for the Board to (1) refuse to approve the use of any textbook, instructional material, supplemental

instructional material, or other curriculum for classroom instruction, or any book or resource in a school library or (2) prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or resource in a school library. The Board may not refuse to approve such use on the basis that the material includes a study of the role and contributions of specified individuals or groups, unless the study of the role and contributions reflects adversely upon legally protected groups. Additionally, the Board may not prohibit such use on the basis that the study of the role and contributions contain inclusive or diverse perspectives.

Education Code 242, as added by AB 1078, requires CDE to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum.

The use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or other resource in a school library shall not be rejected or prohibited by the Board or district on the basis that it includes a study of the role and contributions of any individual or group consistent with the requirements of Education Code 51204.5 and 60040, unless such study would violate Education Code 51501 or 60044. (Education Code 243)

Complaints

CSBA NOTE: Complaints alleging discrimination based on a violation of Education Code 243, as added by AB 1078, related to the use or prohibited use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction, or any book or other resource in a school library as described above, may be brought under the district's uniform complaint procedures or may be filed directly with the SPI. Complaints that are filed directly with the SPI are required to identify the basis for doing so, and present evidence that supports the basis for the direct filing. In such cases, the SPI may directly intervene without waiting for an investigation by the district. See BP/AR 1312.3 – Uniform Complaint Procedures.

Complaints concerning instructional materials shall be handled in accordance with Board Policy 1312.2 - Complaints Concerning Instructional Materials, Board Policy 1312.3 - Uniform Complaint Procedures, or Administrative Regulation 1312.4 - Williams Uniform Complaint Procedures, as applicable.

Policy Reference UPDATE Service

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Policy Reference Disclaimer:

These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State

5 CCR 9505-9530

Description

Instructional materials

Ed. Code 1240

County superintendent of schools; duties

Ed. Code 18111

Exclusion of books by Governing Board that are sectarian, partisan, or denominational character

Ed. Code 220	Prohibition of discrimination
<u>Ed. Code 242</u>	<u>Access to information about educational laws and policies regarding right to accurate and inclusive curriculum</u>
<u>Ed. Code 243</u>	<u>Unlawful discrimination related to the use or prohibited use of textbooks and instructional materials</u>
Ed. Code 33050-33053	General waiver authority
Ed. Code 33126	School accountability report card
Ed. Code 35272	Education and athletic materials
Ed. Code 44805	Enforcement <u>Teacher enforcement</u> of course of studies; use of textbooks, rules and regulations
<u>Ed. Code 48907</u>	<u>Exercise of free expression; time, place and manner rules and regulations</u>
<u>Ed. Code 48950</u>	<u>Speech and other communication</u>
Ed. Code 49415	Maximum textbook weight <u>standards</u>
<u>Ed. Code 51204.5</u>	<u>Social sciences instruction; contributions of specified groups</u>
Ed. Code 51501	Nondiscriminatory subject matter
<u>Ed. Code 51511</u>	<u>Religious matters properly included in courses of study</u>
<u>Ed. Code 51933</u>	<u>Sexual health education and HIV prevention materials</u>
Ed. Code 52060-52077	Local control and accountability plan
Ed. Code 60000-60005	Instructional materials; legislative intent
Ed. Code 60010	Instructional materials; definition
Ed. Code 60040-60052	Requirements for instructional materials
Ed. Code 60060-60063.5	Requirements for publishers and manufacturers
Ed. Code 60070-60076	Prohibited acts (re <u>regarding</u> instructional materials)
Ed. Code 60110-60115	Instructional materials on alcohol and drug education
Ed. Code 60119	Sufficiency of textbooks and instructional materials; hearing and resolution
<u>Ed. Code 60150</u>	<u>Penalty for insufficiency of textbooks and instructional materials</u>
Ed. Code 60200- 60210 <u>60213</u>	Elementary school materials
Ed. Code 60226	Requirements for publishers and manufacturers
Ed. Code 60350-60352	Core reading program instructional materials
Ed. Code 60400-60411	Instructional materials; high schools
Ed. Code 60510-60511	Donation for <u>or</u> sale of obsolete instructional materials

Ed. Code 60605	State-adopted content and performance standards in core curricular areas
Ed. Code 60605.8	Common Core standards
Ed. Code 60605.86-60605.88	Supplemental instructional materials aligned with Common Core State Standards
H&S Code 11032	Narcotics, restricted dangerous drugs, and marijuana; definitions

Management Resources

California Department of Education
Publication

California Department of Education
Publication

California Department of Education
Publication

Website

Website

Website

Website

Website

[Website](#)

[Website](#)

Description

Instructional Materials FAQ

~~01-05~~ Guidelines for Piloting Textbooks and Instructional Materials, [Policy # 01-05](#), rev. January 2015

Standards for Evaluating Instructional Materials for Social Content, 2013

CSBA District and County Office of Education Legal Services

Association of American Publishers

California Academic Content Standards Commission, Common Core State Standards

California Department of Education

CSBA

[Department of Justice \(https://oag.ca.gov/\)](https://oag.ca.gov/)

[U.S. Department of Education, Office for Civil Rights \(https://www2.ed.gov/about/offices/list/ocr/index.html\)](https://www2.ed.gov/about/offices/list/ocr/index.html)

Cross References

Code	Description
0400	Comprehensive Plans
0410	Nondiscrimination In District Programs And Activities
0415	Equity
0440	District Technology Plan
0440	District Technology Plan
0460	Local Control And Accountability Plan
0460	Local Control And Accountability Plan
1220	Citizen Advisory Committees
1220	Citizen Advisory Committees
1312.2	Complaints Concerning Instructional Materials
1312.2	Complaints Concerning Instructional Materials

1312.2-E(1)	Complaints Concerning Instructional Materials
<u>1312.3</u>	<u>Uniform Complaint Procedures</u>
1312.4	Williams Uniform Complaint Procedures
1312.4-E(1)	Williams Uniform Complaint Procedures
1312.4-E(2)	Williams Uniform Complaint Procedures
1325	Advertising And Promotion
1340	Access To District Records
1340	Access To District Records
1700	Relations Between Private Industry And The Schools
3220.1	Lottery Funds
3270	Sale And Disposal Of Books, Equipment And Supplies
3270	Sale And Disposal Of Books, Equipment And Supplies
3290	Gifts, Grants And Bequests
3311	Bids
3311	Bids
4136	Nonschool Employment
4143	Negotiations/Consultation
4236	Nonschool Employment
4243	Negotiations/Consultation
4331	Staff Development
4336	Nonschool Employment
5020	Parent Rights And Responsibilities
5020	Parent Rights And Responsibilities
5145.3	Nondiscrimination/Harassment
5145.3	Nondiscrimination/Harassment
6000	Concepts And Roles
6011	Academic Standards
6020	Parent Involvement
6020	Parent Involvement
6141	Curriculum Development And Evaluation
6141	Curriculum Development And Evaluation
6142.2	World Language Instruction
6142.2	World Language Instruction

6142.6	Visual And Performing Arts Education
6142.8	Comprehensive Health Education
6142.8	Comprehensive Health Education
6142.91	Reading/Language Arts Instruction
6142.92	Mathematics Instruction
6142.93	Science Instruction
6142.94	History-Social Science Instruction
6143	Courses Of Study
6143	Courses Of Study
6144	Controversial Issues
6146.1	High School Graduation Requirements
6161.11	Supplementary Instructional Materials
6161.2	Damaged Or Lost Instructional Materials
6162.5	Student Assessment
6162.6	Use Of Copyrighted Materials
6162.6	Use Of Copyrighted Materials
6163.1	Library Media Centers
6170.1	Transitional Kindergarten
6171	Title I Programs
6171	Title I Programs
6174	Education For English Learners
6174	Education For English Learners
6190	Evaluation Of The Instructional Program
9000	Role Of The Board
9270	Conflict Of Interest
9270-E(1)	Conflict Of Interest
9322	Agenda/Meeting Materials

Regulation 6161.1: Selection And Evaluation Of Instructional Materials

Status: ADOPTED

Original Adopted Date: 11/01/2010 | **Last Revised Date:** 10/01/2020~~2023~~ | **Last Reviewed Date:** 10/01/2020~~2023~~

Review Process

CSBA NOTE: The following section may be revised to reflect district practice. Pursuant to Education Code 60002, the district must provide for "substantial" teacher involvement in the selection of instructional materials and must promote the involvement of parents/guardians and other members of the community in the selection of instructional materials. The Education Code does not define "substantial."

The district's review process for evaluating instructional materials shall involve teachers in a substantial manner and shall encourage the participation of parents/guardians and community members in accordance with Education Code 60002. The review process may also involve administrators, other staff who have subject-matter expertise, and students as appropriate. The Superintendent or designee shall seek input from stakeholders with diverse backgrounds and perspectives.

CSBA NOTE: The following paragraph is for use by districts that maintain any of grades K-8.

If the district is considering the use of instructional materials for grades K-8 that have not been adopted by the State Board of Education (SBE), the Superintendent or designee shall ensure that a majority of the participants in the district's review process are classroom teachers who are assigned to the subject area or grade level of the materials. (Education Code 60210)

CSBA NOTE: The following paragraph is optional. The use of review committees is recommended as a best practice, but is not required by law.

The Superintendent or designee may establish an advisory committee to conduct the review of instructional materials.

The Superintendent or designee shall present to the Governing Board recommendations for instructional materials and documentation that supports the recommendations.

All recommended instructional materials shall be available for public inspection at the district office.

CSBA NOTE: ~~The State Board of Education~~ Education's (SBE) policy on "Guidelines for Piloting Textbooks and Instructional Materials," provides a sample process for piloting instructional materials that addresses the selection of materials to pilot, a chronology of the process, and additional considerations, such as conflict of interest, contacts with publishers, and consideration of standards maps.

When possible, the district may pilot instructional materials in a representative sample of classrooms for a specified period of time during a school year, in order to determine the extent to which the materials support the district's curricular goals and academic standards, and accurately reflect and value society's diversity. Feedback from teachers piloting the materials shall be made available to the Board before the materials are adopted.

Criteria for Selection and Adoption of Instructional Materials

In recommending instructional materials for adoption by the Board, the Superintendent or designee shall ensure that the materials:

CSBA NOTE: The California Department of Education (CDE) provides guidance, available on its website, for the selection of instructional materials that are not adopted by SBE, which includes that districts develop an evaluation instrument that reflects local and state criteria and concerns.

1. 1. Are aligned to the content standards adopted by SBE and consistent with the content and cycles of the curriculum framework adopted by SBE

CSBA NOTE: The following paragraph is for use by districts that offer any of grades K-8. Pursuant to Education Code 60200, SBE is responsible for adopting at least five basic instructional materials for grades K-8 in specified core subjects and any other subject for which SBE determines that the adoption of instructional materials is necessary or desirable.

Education Code 60210 authorizes the Governing Board to select instructional materials for grades K-8 that have not been approved by SBE, provided they are aligned with state academic content standards.

2. For grades K-8, only instructional materials on the list of materials adopted by SBE and/or other instructional materials that have not been adopted by SBE but are aligned with the state academic content standards or the Common Core State Standards may be recommended for selection. (Education Code 60200, 60210)

CSBA NOTE: The following optional paragraph is for use by districts offering any of grades 9-12 and may be revised to reflect district practice. The California Department of Education CDE provides standards map templates, available on its web site website, for reference in determining alignment of instructional materials for gradegrades 9-12 core courses.

3. For grades 9-12, instructional materials in history-social science, mathematics, English/language arts, and science shall be reviewed using a standards map in order to determine the extent to which the materials are aligned to state academic content standards.
4. 2. Do not reflect adversely upon persons because of any characteristic specified in law and ~~BP~~Board Policy 0410 - Nondiscrimination in District Programs and Activities, nor contain any sectarian or denominational doctrine or propaganda contrary to law (Education Code 51501, 60044)
5. 3. To the satisfaction of the Board, are accurate, objective, current, and suited to the differing needs and comprehension of district students at their respective grade levels (Education Code 60045)
6. 4. With the exception of literature and tradebooks, use proper grammar and spelling (Education Code 60045)

CSBA NOTE: Education Code 60048 and 60200 require that the Board not adopt basic instructional materials that provide unnecessary exposure to a commercial brand name, product, or corporate or company logo, unless it makes specific findings that the use has an educational purpose or is incidental to the general nature of an illustration, as provided in ~~item #6~~ Item #5

below. SBE's publication, "Standards for Evaluating Instructional Materials for Social Content," details standards for the use of brand names and corporate logos in instructional materials.

7. 5. Do not expose students to a commercial brand name, product, or corporate or company logo unless the Board makes a specific finding that the use is appropriate based on one of the following: (Education Code 60048, 60200)
 - a. a. The commercial brand name, product, or corporate or company logo is used in text for an educational purpose as defined in guidelines or frameworks adopted by SBE.
 - b. b. The appearance of a commercial brand name, product, or corporate or company logo in an illustration is incidental to the general nature of the illustration.

CSBA NOTE: Education Code 60040-60043 require that ~~specific~~certain subject matter be included in the district's instructional materials: as specified below. Education Code 60040 requires that ~~instructional materials include accurate portrayals,~~ as amended by AB 1078 (Ch. 229, Statutes of 2023), expands the accurate portrayal of society's cultural and racial diversity of society as specified. Education Code 60041 requires (1) accurate portrayal of humanity's place in ecological systems to include the contributions of all genders (formerly "men and the need to protect the environment women"), Latino Americans (formerly "Mexican Americans"), LGBTQ+ Americans (formerly "lesbian, gay, bisexual, and (2) the effects of tobacco, alcohol, transgender Americans"), and members of other drug use on the human system. Education Code 60042 requires the Board to adopt materials as it deems necessary to encourage thrift, fire prevention ethnic, cultural, religious, and the humane treatment of animals socioeconomic status groups (formerly "ethnic and people. Education Code 60043 requires that the Board, when appropriate to the comprehension of students, adopt textbooks for social science, history, or civics classes that contain the Declaration of Independence cultural"). The complete list required by Education Code 60040, as amended by AB 1078, is reflected below.

Additionally, pursuant to Education Code 60040.5, as added by AB 1078, CDE is required to issue, by July 1, 2025, guidance regarding how to review instructional materials to ensure that they represent diverse perspectives and the Constitution of the United States. If desired, the district may expand item #6 below to list these specific requirements: are culturally relevant.

8. 6. Meet the requirements of Education Code 60040-60043 for specific subject content, including, but not limited, accurately portraying society's cultural and racial diversity to:
 - a. Accurately portraying society's cultural and racial diversity, including:
 - i. The contributions of all genders in all types of roles, including professional, vocational, and executive roles
 - ii. The role and contributions of Native Americans, African Americans, Latino Americans, Asian Americans, Pacific Islanders, European Americans, LGBTQ+ Americans, persons with disabilities, and members of other ethnic, cultural, religious, and socioeconomic groups to the total development of California and the United States

- iii. The role and contributions of the entrepreneur and labor in the total development of California and the United States
- b. Accurately portraying humanities place in ecological systems and the necessity for the protection of the environment
- c. Accurately portraying the effects on the human system of the use of tobacco, alcohol, and narcotics, and restricted dangerous drugs as defined in Health and Safety Code 11032, and other dangerous substances
- d. Encouraging thrift, fire prevention, and the humane treatment of animals and people
- e. Requiring, when appropriate to the comprehension of students, that textbooks for social science, history, or civics classes contain the Declaration of Independence and the United States Constitution

CSBA NOTE: Items #7-14 below are optional and may be revised to reflect district practice. The district may choose to develop subject-specific criteria as well as general criteria.

- 9. 7. Support the district's adopted courses of study and curricular goals , including the district's local control and accountability plan
- ~~10.~~ 8. Contribute to a comprehensive, balanced curriculum
- ~~11.~~ 9. Demonstrate reliable quality of scholarship as evidenced by:
 - a. a. Accurate, up-to-date, and well-documented information
 - b. b. Objective presentation of diverse viewpoints
 - c. c. Clear, concise writing and appropriate vocabulary
 - d. d. Thorough treatment of subject matter
- ~~12.~~ 10. Provide for a wide range of materials at all levels of difficulty, with appeal to students of varied interests, abilities, and developmental levels
- ~~13.~~ 11. Stimulate discussion of contemporary issues, exploration of ideas, and intellectual discourse, and improve students' thinking and decision-making skills
- ~~14.~~ 12. As appropriate, have corresponding versions available in languages other than English
- ~~15.~~ 13. Include high-quality teacher's guides

CSBA NOTE: 5 CCR 9517.2 sets the following maximum weight standards for each student textbook: three pounds for grades K-4, four pounds for grades 5-8, and five pounds for grades 9-12. 5 CCR 9517.2 requires publishers submitting textbooks to SBE that exceed those weight standards to provide lighter weight alternatives, such as split volumes or electronic editions, soft cover editions, or other alternate physical formats. For materials for grades 9-12, publishers must disclose the availability of lighter weight alternatives. Item #14 below includes textbook weight as one of the criteria for Board consideration.

14. 14. When available, include options for lighter weight materials, including materials in digital format, in order to help minimize any injury to students by the combined weight of instructional materials

In addition to meeting the above criteria as applicable, technology-based materials shall:

1. 1. Be both available and comparable to other, equivalent instructional materials (Education Code 60052)
2. 2. Be accessible to all students, including economically disadvantaged students, students with disabilities, and English learners
3. 3. Protect the privacy of student data

Conflict of Interest

CSBA NOTE: The following optional section is for use by districts that choose to require individuals who will participate in the review process to first complete a disclosure statement which provides an opportunity to disclose any conflict of interest or appearance of conflict of interest.

To ensure integrity in the evaluation and selection of instructional materials, individuals who are participating in the evaluation of instructional materials and are not otherwise designated in the district's conflict of interest code shall sign a disclosure statement indicating that they:

CSBA NOTE: Education Code 60061 ~~requires~~ provides criteria and/or limitations for publishers to ~~provide~~ follow when establishing the cost of the materials being furnished; see CDE's website for a price list of adopted instructional materials free of charge within California to the same extent that they provide free materials to other states or school districts; see Price List of Adopted Instructional Materials on CDE's web site. However, Additionally, Education Code 60071 forbids publishers from offering "valuable thing(s)" to school officials for the purpose of influencing the purchase of instructional materials. CDE's Instructional Materials FAQ clarifies that, in accordance with the definition of "technology-based materials" in Education Code 60010, districts may accept electronic equipment necessary to make use of technology-based materials provided that such equipment is used by students and teachers as a learning resource, not to replace computers or related equipment in an existing computer lab or to establish a new computer lab.

1. Will not accept any emolument, money, or other valuable thing or inducement to directly or indirectly introduce, recommend, vote for, or otherwise influence the adoption or purchase of any instructional material (Education Code 60072)

Sample copies of instructional materials are excepted from this prohibition: (Education Code 60075)

CSBA NOTE: Items # 2-4 below are optional and should be modified to reflect district practice.

2. Are not employed by nor receive compensation from the publisher or supplier of the instructional materials or any person, firm, organization, subsidiary, or controlling entity representing it

3. Do not have an interest as a contributor, author, editor, or consultant in any textbook or other instructional material submitted to the district

Policy Reference UPDATE Service

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Policy Reference Disclaimer:

These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State	Description
5 CCR 9505-9530	Instructional materials
Ed. Code 1240	County superintendent of schools; duties
<u>Ed. Code 18111</u>	<u>Exclusion of books by Governing Board that are sectarian, partisan, or denominational character</u>
Ed. Code 220	Prohibition of discrimination
<u>Ed. Code 242</u>	<u>Access to information about educational laws and policies regarding right to accurate and inclusive curriculum</u>
<u>Ed. Code 243</u>	<u>Unlawful discrimination related to the use or prohibited use of textbooks and instructional materials</u>
Ed. Code 33050-33053	General waiver authority
Ed. Code 33126	School accountability report card
Ed. Code 35272	Education and athletic materials
Ed. Code 44805	Enforcement <u>Teacher enforcement</u> of course of studies; use of textbooks, rules and regulations
<u>Ed. Code 48907</u>	<u>Exercise of free expression; time, place and manner rules and regulations</u>
<u>Ed. Code 48950</u>	<u>Speech and other communication</u>
Ed. Code 49415	Maximum textbook weight <u>standards</u>
<u>Ed. Code 51204.5</u>	<u>Social sciences instruction; contributions of specified groups</u>
Ed. Code 51501	Nondiscriminatory subject matter
<u>Ed. Code 51511</u>	<u>Religious matters properly included in courses of study</u>
<u>Ed. Code 51933</u>	<u>Sexual health education and HIV prevention materials</u>

Ed. Code 52060-52077	Local control and accountability plan
Ed. Code 60000-60005	Instructional materials; legislative intent
Ed. Code 60010	Instructional materials; definition
Ed. Code 60040-60052	Requirements for instructional materials
Ed. Code 60060-60063.5	Requirements for publishers and manufacturers
Ed. Code 60070-60076	Prohibited acts (re regarding instructional materials)
Ed. Code 60110-60115	Instructional materials on alcohol and drug education
Ed. Code 60119	Sufficiency of textbooks and instructional materials; hearing and resolution
Ed. Code 60150	Penalty for insufficiency of textbooks and instructional materials
Ed. Code 60200- 60210 60213	Elementary school materials
Ed. Code 60226	Requirements for publishers and manufacturers
Ed. Code 60350-60352	Core reading program instructional materials
Ed. Code 60400-60411	Instructional materials; high schools
Ed. Code 60510-60511	Donation for or sale of obsolete instructional materials
Ed. Code 60605	State-adopted content and performance standards in core curricular areas
Ed. Code 60605.8	Common Core standards
Ed. Code 60605.86-60605.88	Supplemental instructional materials aligned with Common Core State Standards
H&S Code 11032	Narcotics, restricted dangerous drugs, and marijuana: definitions
Management Resources	Description
California Department of Education Publication	Instructional Materials FAQ
California Department of Education Publication	01-05 Guidelines for Piloting Textbooks and Instructional Materials, Policy # 01-05 , rev. January 2015
California Department of Education Publication	Standards for Evaluating Instructional Materials for Social Content, 2013
Website	CSBA District and County Office of Education Legal Services
Website	Association of American Publishers
Website	California Academic Content Standards Commission, Common Core State Standards
Website	California Department of Education

Website

CSBA

[Website](#)

[Department of Justice \(https://oag.ca.gov/\)](https://oag.ca.gov/)

[Website](#)

[U.S. Department of Education, Office for Civil Rights \(https://www2.ed.gov/about/offices/list/ocr/index.html\)](https://www2.ed.gov/about/offices/list/ocr/index.html)

Cross References

Code	Description
0400	Comprehensive Plans
0410	Nondiscrimination In District Programs And Activities
0415	Equity
0440	District Technology Plan
0440	District Technology Plan
0460	Local Control And Accountability Plan
0460	Local Control And Accountability Plan
1220	Citizen Advisory Committees
1220	Citizen Advisory Committees
1312.2	Complaints Concerning Instructional Materials
1312.2	Complaints Concerning Instructional Materials
1312.2-E(1)	Complaints Concerning Instructional Materials
1312.3	Uniform Complaint Procedures
1312.4	Williams Uniform Complaint Procedures
1312.4-E(1)	Williams Uniform Complaint Procedures
1312.4-E(2)	Williams Uniform Complaint Procedures
1325	Advertising And Promotion
1340	Access To District Records
1340	Access To District Records
1700	Relations Between Private Industry And The Schools
3220.1	Lottery Funds
3270	Sale And Disposal Of Books, Equipment And Supplies
3270	Sale And Disposal Of Books, Equipment And Supplies
3290	Gifts, Grants And Bequests
3311	Bids
3311	Bids
4136	Nonschool Employment

4143	Negotiations/Consultation
4236	Nonschool Employment
4243	Negotiations/Consultation
4331	Staff Development
4336	Nonschool Employment
5020	Parent Rights And Responsibilities
5020	Parent Rights And Responsibilities
5145.3	Nondiscrimination/Harassment
5145.3	Nondiscrimination/Harassment
6000	Concepts And Roles
6011	Academic Standards
6020	Parent Involvement
6020	Parent Involvement
6141	Curriculum Development And Evaluation
6141	Curriculum Development And Evaluation
6142.2	World Language Instruction
6142.2	World Language Instruction
6142.6	Visual And Performing Arts Education
6142.8	Comprehensive Health Education
6142.8	Comprehensive Health Education
6142.91	Reading/Language Arts Instruction
6142.92	Mathematics Instruction
6142.93	Science Instruction
6142.94	History-Social Science Instruction
6143	Courses Of Study
6143	Courses Of Study
6144	Controversial Issues
6146.1	High School Graduation Requirements
6161.11	Supplementary Instructional Materials
6161.2	Damaged Or Lost Instructional Materials
6162.5	Student Assessment
6162.6	Use Of Copyrighted Materials
6162.6	Use Of Copyrighted Materials

6163.1	Library Media Centers
6170.1	Transitional Kindergarten
6171	Title I Programs
6171	Title I Programs
6174	Education For English Learners
6174	Education For English Learners
6190	Evaluation Of The Instructional Program
9000	Role Of The Board
9270	Conflict Of Interest
9270-E(1)	Conflict Of Interest
9322	Agenda/Meeting Materials

**RIVER DELTA UNIFIED SCHOOL DISTRICT
RESOLUTION #854**

**Resolution on Sufficiency of Textbooks and/or
Instructional Materials
For 2023-2024**

Whereas, the Board of Trustees of the River Delta Unified School District, in order to comply with the requirements of Education Code 60119, held a public hearing on September 12, 2023, at 6:30 o'clock in the evening (which is on or before the eighth week of school -- between the first day that students attend school and the end of the eighth week from that day-- 8/9/23 – 10/4/23) and which did not take place during or immediately following school hours, and;

Whereas, the Board provided at least 10 days' notice of the public hearing by posting it in at least three public places within the district stating the time, place, and purpose of the hearing, and;

Whereas, the Board encouraged participation by parents/guardians, teachers, members of the community, and bargaining unit leaders in the public hearing, and;

Whereas, information provided at the public hearing detailed the extent to which textbooks and instructional materials were provided to all students, including English learners, in the River Delta Unified School District, and;

Whereas, the definition of "sufficient textbooks or instructional materials" means that each student, including English learners, has a textbook or instructional materials, or both, to use in class and to take home, and;

Whereas between the 2008-09 through the 2023-2024 fiscal years, the definition of "sufficient textbooks or instructional materials" also means that all students who are enrolled in the same course within the River Delta Unified School District, have standards-aligned textbooks or instructional materials from the same adoption cycle, and;

Whereas, sufficient textbooks and instructional materials were provided to each student, including English learners, which are aligned to the academic content standards and consistent with the cycles and content of the curriculum frameworks in the following subjects:

Mathematics

Science

History-Social Science

English/Language Arts, including the English language development component of an adopted program

Whereas, sufficient textbooks or instructional materials were provided to each student enrolled in foreign language or health classes, and;

Whereas, laboratory science equipment was available for Science Laboratory classes offered in grades 9-12, inclusive;

NOW, THEREFORE, BE IT RESOLVED, that for the 2023-2024 school year, the River Delta Unified School District, has provided each student with sufficient textbooks and instructional materials aligned to the academic content standards and consistent with the cycles and content of the curriculum frameworks.

PASSED AND ADOPTED the 12th day of September, 2023 by the Board of Trustees of the River Delta Unified School District of Sacramento County, California, by the following roll call vote:

AYES: 6 (Stone, Jelly, Casillas, Opel, Mahoney, Lamerca)
NOES: 0
ABSTAIN: 0
ABSENT: 1 (Riley)

IN WITNESS WHEREOF, I, Randall Jelly, Clerk of the Board of Trustees of the River Delta Unified School District of Sacramento County, California, certify that the foregoing is a full, true, and correct copy of Resolution No. 854 adopted by the said Board at a Regular Board meeting thereof held at a regular public place of meeting and the resolution is on file in the office of said Board.



Randall Jelly, Clerk
Board of Trustees
River Delta Unified School District

September 12, 2023
(Date)

Policy Reference Disclaimer:

These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State

5 CCR 9505-9530

Ed. Code 1240

[Ed. Code 18111](#)

Ed. Code 220

[Ed. Code 242](#)**Description**

Instructional materials

County superintendent of schools; duties

[Exclusion of books by Governing Board that are sectarian, partisan, or denominational character](#)

Prohibition of discrimination

[Access to information about educational laws and policies regarding right to accurate and inclusive curriculum](#)

<u>Ed. Code 243</u>	<u>Unlawful discrimination related to the use or prohibited use of textbooks and instructional materials</u>
Ed. Code 33050-33053	General waiver authority
Ed. Code 33126	School accountability report card
Ed. Code 35272	Education and athletic materials
Ed. Code 44805	Enforcement <u>Teacher enforcement</u> of course of studies; use of textbooks, rules and regulations
<u>Ed. Code 48907</u>	<u>Exercise of free expression; time, place and manner rules and regulations</u>
<u>Ed. Code 48950</u>	<u>Speech and other communication</u>
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<u>Ed. Code 51204.5</u>	<u>Social sciences instruction; contributions of specified groups</u>
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<u>Ed. Code 51933</u>	<u>Sexual health education and HIV prevention materials</u>
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Ed. Code 60060-60063.5	Requirements for publishers and manufacturers
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Ed. Code 60110-60115	Instructional materials on alcohol and drug education
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<u>Ed. Code 60150</u>	<u>Penalty for insufficiency of textbooks and instructional materials</u>
Ed. Code 60200- 60210 <u>60213</u>	Elementary school materials
Ed. Code 60226	Requirements for publishers and manufacturers
Ed. Code 60350-60352	Core reading program instructional materials
Ed. Code 60400-60411	Instructional materials; high schools
Ed. Code 60510-60511	Donation for <u>or</u> sale of obsolete instructional materials
Ed. Code 60605	State-adopted content and performance standards in core curricular areas
Ed. Code 60605.8	Common Core standards

Ed. Code ~~60605.86-60605.88~~

Supplemental instructional materials aligned with
Common Core State Standards

H&S Code 11032

[Narcotics, restricted dangerous drugs, and marijuana;
definitions](#)

Management Resources

Description

California Department of Education
Publication

Instructional Materials FAQ

California Department of Education
Publication

01-05 Guidelines for Piloting Textbooks and
Instructional Materials, [Policy # 01-05](#), rev. January 2015

California Department of Education
Publication

Standards for Evaluating Instructional Materials for Social
Content, 2013

Website

CSBA District and County Office of Education Legal
Services

Website

Association of American Publishers

Website

California Academic Content Standards Commission,
Common Core State Standards

Website

California Department of Education

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[Website](#)

[Department of Justice \(https://oag.ca.gov/\)](https://oag.ca.gov/)

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\(https://www2.ed.gov/about/offices/list/ocr/index.html\)](https://www2.ed.gov/about/offices/list/ocr/index.html)

Cross References

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0410

Nondiscrimination In District Programs And Activities

0415

Equity

0440

District Technology Plan

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District Technology Plan

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Local Control And Accountability Plan

0460

Local Control And Accountability Plan

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Citizen Advisory Committees

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Citizen Advisory Committees

1312.2

Complaints Concerning Instructional Materials

1312.2

Complaints Concerning Instructional Materials

1312.2-E(1)

Complaints Concerning Instructional Materials

[1312.3](#)

[Uniform Complaint Procedures](#)

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6142.2	World Language Instruction
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6142.8	Comprehensive Health Education
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6174	Education For English Learners
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9270-E(1)	Conflict Of Interest
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Policy 6161.11: Supplementary Instructional Materials

Status: ADOPTED

Original Adopted Date: 12/01/1990 | **Last Revised Date:** 11/10/01/2012/2023 | **Last Reviewed Date:** 11/10/01/2012/2023

CSBA NOTE: The following optional policy addresses the selection of instructional materials that are used to supplement the basic textbooks and other instructional materials adopted by the Governing Board for use in grades K-8 pursuant to Education Code 60200 or for grades 9-12 pursuant to Education Code 60400. See BP/AR 6161.1 - Selection and Evaluation of Instructional Materials for requirements pertaining to the selection of those basic instructional materials.

The Governing Board encourages the use of supplementary instructional materials to enrich the curriculum and enhance student learning. Such materials shall be aligned with district goals, curriculum objectives, and academic standards and shall supplement and not supplant the use of Board-adopted basic instructional materials that serve as the primary learning resources.

Supplementary instructional materials include, but are not limited to, instructional materials that are designed to serve one or more of the following purposes: (Education Code 60010)

1. To provide more complete coverage of one or more subjects included in a given course
2. To meet the various learning ability levels of students in a given age group or grade level
3. To meet the diverse educational needs of students with a language disability in a given age group or grade level
4. To meet the diverse educational needs of students reflective of a condition of cultural pluralism
5. To use current, relevant technology that further engages interactive learning in the classroom and beyond

Supplementary instructional materials may be selected by the Superintendent or designee, school administrators, or teachers, as applicable, and obtained through donations to the district and/or available funding sources designated for these purposes.

CSBA NOTE: In *McCarthy v. Fletcher*, a California appellate court clarified that the Board may exclude materials from classroom teaching because they are educationally unsuitable and unrelated to the goals specified in Education Code 233.5, but not simply because the materials contain ideas to which Board or community members object.

Education Code 243, as added by AB 1078 (Ch. 229, Statutes of 2023), clarifies when it is unlawful discrimination for the Board to (1) refuse to approve the use of any supplemental instructional material or (2) prohibit the use of any supplemental instructional material. The Board may not refuse to approve the use of any supplemental instructional material on the basis that the material includes a study of the role and contributions of specified individuals or groups, unless the study of the role and contributions reflects adversely upon legally protected groups. Additionally, the Board may not prohibit the use of any supplemental instructional material on the basis that the study of the role and contributions contain inclusive or diverse perspectives.

For more information, the California Department of Education's (CDE) website provides guidance on the removal of instruction or instructional materials. In addition, Education Code 60040.5, as added by AB 1078, requires CDE to issue, no later than July 1, 2025, guidance regarding how to review instructional materials to ensure that they represent diverse perspectives and are culturally relevant. Additionally, Education Code 242, as added by AB 1078, requires CDE to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum.

The use of any supplemental instructional material shall not be rejected or prohibited by the Board or district on the basis that it includes a study of the role and contributions of any individual or group consistent with the requirements of Education Code 51204.5 and 60040, unless such study would violate Education Code 51501 or 60044. (Education Code 243)

As appropriate, supplementary instructional materials shall meet the criteria developed for the selection and evaluation of basic instructional materials as described in AR 6161.1 - Selection and Evaluation of Instructional Materials.

Supplementary instructional materials shall be directly related to the course of study in which they are being used and shall be appropriate for the age and maturity level of the students.

The use or reproduction of supplementary instructional materials shall be in accordance with federal copyright law.

Supplementary Materials Aligned with Common Core Standards

CSBA NOTE: The following optional section is for use by districts that maintain any of grades K-8. Pursuant to Education Code 60605.8, the State Board of Education (SBE) has adopted Common Core Standards in English language arts and mathematics; see BP 6011 - Academic Standards. In November 2012, the SBE adopted updated English language development standards for English learners which are aligned to the Common Core Standards. However, the SBE has not yet adopted K-8 textbooks and instructional materials aligned to the Common Core Standards because Education Code 60200.7 suspended state adoptions of instructional materials until the 2015-16 school year. To bridge the gap, Education Code 60605.86, as added by SB 140 (Ch. 623, Statutes of 2011), and Education Code 60605.87-60605.88, as added by AB 1719 (Ch. 636, Statutes of 2012), require the California Department of Education (CDE) to recommend and the SBE to approve lists of supplementary instructional materials aligned with the Common Core Standards in English language arts by September 30, 2012, mathematics by July 30, 2013, and English language development by June 30, 2014. These lists of supplementary materials will be available on the CDE's web site and are informational only; districts are not required to purchase any of the supplementary materials.

To prepare district students to achieve the Common Core Standards in English language arts and mathematics and the English language development standards, as applicable, the Board may select supplementary instructional materials from the lists of materials determined by the State Board of Education (SBE) to be aligned with those standards. (Education Code 60605.86-60605.88)

CSBA NOTE: Pursuant to Education Code 60605.86-60605.88, as added by SB 140 (Ch. 623, Statutes of 2011) and AB 1719 (Ch. 636, Statutes of 2012), the district may select supplementary materials that are not on the SBE-approved lists. Such materials must be reviewed and recommended by content review experts who are selected by the Board, meet specified qualifications, and serve without compensation. The Board must ensure that the selected materials comply with SBE-approved evaluation criteria, which are available on the CDE's web site, and

specified legal requirements for instructional materials, including social content review requirements.

The Board may approve supplementary instructional materials that are not on the lists approved by the SBE but which are aligned with the Common Core Standards provided that the materials comply with the evaluation criteria established by the SBE and Education Code 60050, 60060-60062, and 60226. The Board shall select content review experts who possess the qualifications specified in law to review and recommend such supplementary materials. The majority of the content review experts shall be teachers who are credentialed and/or authorized in the subject area they are reviewing and the remainder shall include appropriate persons from postsecondary educational institutions, school and district curriculum administrators, and other persons who are knowledgeable in the subject area. (Education Code 60605.86-60605.88)

Appropriateness of Materials

CSBA NOTE: The following optional section may be revised to reflect district practice, including any district criteria for the appropriateness of supplementary instructional materials and/or circumstances under which materials should be submitted to the principal or other designee for review prior to their use (e.g., when materials relate to controversial issues or are presented in a controversial manner or context, such as when materials contain nudity, sexual content, graphic violence, or extensive profanity). The district is encouraged to consult CSBA's District and County Office of Education Legal Services or district legal counsel prior to adopting such criteria or processes or when banning films, electronic resources, or other materials solely on the basis of industry ratings.

Whenever a district employee proposes to use a supplementary resource which is not included in the approved learning resources of the district, ~~he/she~~the employee shall preview the material to determine whether, in ~~his/her~~the employee's professional judgment, it is appropriate for the grade level taught and is consistent with district criteria for the selection of supplementary instructional materials.

The employee shall confer with the Superintendent or designee as necessary to determine the compliance of the material with district criteria. The primary considerations should be the educational value, factual accuracy, appropriateness, including whether the material contains pervasive vulgarity or profanity, and relevance of the materials, as well as the ages and maturity of the students.

The Superintendent or designee may provide training to administrators and teachers in the selection and evaluation of supplementary instructional materials, including the criteria to be utilized and applicable legal considerations.

Complaints

CSBA NOTE: Complaints alleging discrimination based on a violation of Education Code 243, as added by AB 1078, related to the use or prohibited use of any supplemental instructional material as described above, may be brought under the district's uniform complaint procedures or may be filed directly with the Superintendent of Public Instruction (SPI). Complaints that are filed directly with the SPI are required to identify the basis for doing so, and present evidence that supports the basis for the direct filing. In such cases, the SPI may directly intervene without waiting for an investigation by the district. See BP/AR 1312.3 - Uniform Complaint Procedures.

Complaints concerning supplemental instructional materials shall be handled in accordance with Board Policy 1312.2 - Complaints Concerning Instructional Materials and Board Policy 1312.3 - Uniform Complaint Procedures, as applicable.

Policy Reference Disclaimer:

These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State

[5 CCR 4600-4670](#)

Ed. Code 18111

[Ed. Code 220](#)

Ed. Code 233.5

[Ed. Code 242](#)

[Ed. Code 243](#)

[Ed. Code 48907](#)

[Ed. Code 48950](#)

[Ed. Code 51204.5](#)

[Ed. Code 51501](#)

Ed. Code 51510

Ed. Code 51511

Ed. Code 51933

[Ed. Code 60000-60005](#)

Ed. Code 60010

Ed. Code ~~60050~~[60040-60052](#)

Ed. Code ~~60060-60062~~[60063.5](#)

Ed. Code ~~60200.7~~[60213](#)

Ed. Code 60226

Ed. Code ~~60400~~[60411](#)

[Ed. Code 60605](#)

Description

[Uniform complaint procedures](#)

Exclusion of books by governing board [that are sectarian, partisan, or denominational character](#)

[Prohibition of discrimination](#)

Teaching of principles

[Access to information about educational laws and policies regarding right to accurate and inclusive curriculum](#)

[Unlawful discrimination related to the use or prohibited use of textbooks and instructional materials](#)

[Exercise of free expression; time, place and manner rules and regulations](#)

[Speech and other communication](#)

[Social sciences instruction; contributions of specified groups](#)

[Nondiscriminatory subject matter](#)

Prohibited study or supplemental materials

Religious matters properly included in courses of study

~~Sex education materials~~ [Sexual health education and HIV prevention materials](#)

[Instructional materials; legislative intent](#)

Instructional materials; definition

~~Social content review of~~ [Requirements for](#) instructional materials

~~Requirements of publishers~~ [Requirements for publishers and manufacturers](#)

~~Suspension of state instructional~~ [Elementary school](#) materials adoptions

Requirements for publishers and manufacturers

~~Adoption of high school instructional materials~~ [Instructional materials; high schools](#)

[State-adopted content and performance standards in core curricular areas](#)

Ed. Code 60605.8	Common Core standards
Ed. Code 60605.86-60605.88	Supplemental instructional materials aligned with Common Core State Standards
Ed. Code 60811.3	English language development standards
Management Resources	Description
California Department of Education Publication	Standards for Evaluating Instructional Materials for Social Content, 2000 <u>2013</u>
Court Decision	Fowler v. Board of Education of Lincoln County, (1978) <u>(1987)</u> 819 F.2d 657
Court Decision	McCarthy v. Fletcher, (1989) 207 Cal. App. 3d 130
Website	CSBA District and County Office of Education Legal Services
Website	California Department of Education
Website	CSBA
<u>Website</u>	<u>Department of Justice (https://oag.ca.gov/)</u>
<u>Website</u>	<u>U.S. Department of Education, Office for Civil Rights (https://www2.ed.gov/about/offices/list/ocr/index.html)</u>

Cross References

Code	Description
0000	Vision
0200	Goals For The School District
<u>0410</u>	<u>Nondiscrimination in District Programs and Activities</u>
1260	Educational Foundation
1312.2	Complaints Concerning Instructional Materials
1312.2	Complaints Concerning Instructional Materials
1312.2-E(1)	Complaints Concerning Instructional Materials
<u>1312.3</u>	<u>Uniform Complaint Procedures</u>
<u>1312.4</u>	<u>Williams Uniform Complaint Procedures</u>
1325	Advertising And Promotion
3270	Sale And Disposal Of Books, Equipment And Supplies
3270	Sale And Disposal Of Books, Equipment And Supplies
3290	Gifts, Grants And Bequests
3311	Bids
3311	Bids
4132	Publication Or Creation Of Materials

4232	Publication Of Creation Of Materials
4332	Publication Of Creation Of Materials
<u>5145.3</u>	<u>Nondiscrimination/Harassment</u>
6000	Concepts And Roles
6011	Academic Standards
6141	Curriculum Development And Evaluation
6141	Curriculum Development And Evaluation
6141.2	Recognition Of Religious Beliefs And Customs
6141.2	Recognition Of Religious Beliefs And Customs
6142.1	Sexual Health And HIV/AIDS Prevention Instruction
6142.1	Sexual Health And HIV/AIDS Prevention Instruction
6142.2	World Language Instruction
6142.2	World Language Instruction
6142.6	Visual And Performing Arts Education
6142.91	Reading/Language Arts Instruction
6142.92	Mathematics Instruction
6142.93	Science Instruction
6142.94	History-Social Science Instruction
<u>6143</u>	<u>Courses Of Study</u>
6144	Controversial Issues
6161.1	Selection And Evaluation Of Instructional Materials
6161.1	Selection And Evaluation Of Instructional Materials
6161.1-E(1)	Selection And Evaluation Of Instructional Materials
6162.6	Use Of Copyrighted Materials
6162.6	Use Of Copyrighted Materials
6163.1	Library Media Centers
6174	Education For English Learners
6174	Education For English Learners

Policy 6163.1: Library Media Centers

Status: ADOPTED

Original Adopted Date: 03/01/2011 | **Last Revised Date:** 04/10/01/20142023 | **Last Reviewed Date:** 04/10/01/20142023

CSBA NOTE: Education Code 18100 requires the Governing Board to provide library services for students and teachers by maintaining school libraries or contracting with another public agency. The following optional policy is intended for use by districts that maintain their own school libraries, but may be modified to meet the needs of districts that enter into an arrangement to receive services from either a county or city library pursuant to Education Code 18130 or 18134; also see BP 1330.1 - Joint Use Agreements.

The State Board of Education (SBE) has adopted model program standards for school libraries which describe ~~staffing, resources, and infrastructure~~ (1) school library standards for students that delineate what students should know and be able to do at each grade level (see section "Library Instruction," below), and (2) school library program standards that describe staffing, access, resources, and infrastructure, including technology, recommended for effective school library programs. The following policy may be modified to reflect state program standards that the district chooses to implement.

The Governing Board recognizes that school libraries support the educational program by providing access to a variety of informational and supplemental resources that can ~~help raise~~ inspire a love of reading, stimulate thought, the exploration of ideas and intellectual exchanges, and contribute to the academic achievement of all students. The Board desires that school libraries be stocked with up-to-date books, reference materials, and electronic resources that promote literacy, support academic standards, contain a broad spectrum of knowledge and viewpoints, accurately reflect and value society's diversity, and prepare students to become lifelong learners.

Staffing

CSBA NOTE: The following optional paragraph may be revised to reflect district practice. Pursuant to Education Code 35021, the district may not use volunteer aides in lieu of classified employees whose positions were abolished.

The Board also may appoint classified paraprofessionals to serve as library aides or library technicians. Volunteers may assist with school library services in accordance with law, Board policy, and administrative regulation.

Hours of Operation

School libraries shall be open for use by students and teachers during the school day. (Education Code 18103)

Selection and Evaluation of School Library Materials

CSBA NOTE: The following optional section may be revised to reflect district practice. At its discretion, the Board may establish selection criteria that exclude all materials of a sectarian, partisan, or denominational character as authorized by Education Code 18111.

Library materials shall include print and electronic resources that align with the curriculum and are accessible to students with varying cognitive and/or language needs.

Library materials shall be selected and evaluated ~~and selected~~ through a process that invites recommendations from administrators, teachers, other staff, parents/guardians, and students as appropriate.

CSBA NOTE: Education Code 243, as added by AB 1078 (Ch. 229, Statutes of 2023), clarifies when it is unlawful discrimination for the Board to (1) refuse to approve the use of any book or other resource in a school library or (2) prohibit the use of any book or other resource in a school library. The Board may not refuse to approve the use of any book or other resource in a school library on the basis that the material includes a study of the role and contributions of specified individuals or groups, unless the study of the role and contributions reflects adversely upon legally protected groups. Additionally, the Board may not prohibit the use of any book or other resource in a school library on the basis that the study of the role and contributions contain inclusive or diverse perspectives.

For more information, the California Department of Education's (CDE) website provides guidance on the removal of instruction or instructional materials. In addition, Education Code 60040.5, as added by AB 1078 (2023), requires CDE to issue, no later than July 1, 2025, guidance regarding

how to review instructional materials to ensure that they represent diverse perspectives and are culturally relevant. Additionally, Education Code 242, as added by AB 1078, requires CDE to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum.

The use of any book or other resource in a school library shall not be rejected or prohibited by the Board or district on the basis that it includes a study of the role and contributions of any individual or group consistent with the requirements of Education Code 51204.5 and 60040, unless such study would violate Education Code 51501 or 60044. (Education Code 243)

Library materials shall be continually evaluated in relation to evolving curricula, new formats of materials, new instructional methods, and the needs of students and teachers. Materials that contain outdated subject matter or are no longer appropriate shall be removed.

All gifts and donations of school library materials shall be subject to the same criteria as materials selected for purchase by the district.

Complaints regarding the appropriateness of library materials shall be addressed using the district's procedures for complaints regarding instructional materials.

Fees

CSBA NOTE: Complaints alleging discrimination based on a violation of Education Code 243, as added by AB 1078, related to the use or prohibited use of any book or other resource in a school library as described above, may be brought under the district's uniform complaint procedures or may be filed directly with the Superintendent of Public Instruction (SPI). Complaints that are filed directly with the SPI are required to identify the basis for doing so, and present evidence that supports the basis for the direct filing. In such cases, the SPI may directly intervene without waiting for an investigation by the district. See BP/AR 1312.3 – Uniform Complaint Procedures.

Complaints regarding the appropriateness of library materials shall be addressed in accordance with Board Policy 1312.2 – Complaints Concerning Instructional Materials and Board Policy 1312.3 – Uniform Complaint Procedures, as applicable.

Fees

Students shall be encouraged to return library materials in a timely manner, but no charge shall be assessed for the late return of materials.

CSBA NOTE: Pursuant to 5 CCR 16042, the district shall not charge students for the late return of library materials unless authorized to do so by the Board. The district should select the option below that reflects district practice. Option 2 may be modified to include the amount that will be charged.

Students shall be encouraged to return library materials in a timely manner, but no charge shall be assessed for the late return of materials.

Library Instruction

CSBA NOTE: In September 2010, the SBE adopted model academic standards for library instruction which address what students should know and be able to do at each grade level or grade span in terms of information literacy skills. The introduction to the standards expresses the intent that the standards be taught collaboratively by the classroom teacher and the teacher librarian within the context of the curriculum. The following optional section reflects the four major categories addressed in the state standards and may be revised to reflect district practice.

The SBE has also developed a document identifying examples of where the library instruction standards are aligned with Common Core State Standards. See the California Department of Education's (CDE) web site. [See CDE's website.](#)

Teacher librarians and/or classroom teachers shall provide library instruction to ~~develop~~support the development of students' information literacy skills. Such instruction shall be aligned with the state academic standards for library instruction and shall prepare students to:

1. Access information by applying knowledge of the organization of libraries, print materials, digital media, and other sources
2. Evaluate and analyze information to determine appropriateness in addressing the scope of inquiry
3. Organize, synthesize, create, and communicate information
4. Integrate information literacy skills into all areas of learning and pursue information independently to become life-long learners

Teacher librarians also may provide support to teachers, administrators, and other staff by identifying instructional materials that will aid in the development of curriculum and instructional activities and by providing information about effective and ethical uses of school library services and equipment.

Program Evaluation

CSBA NOTE: Education Code 18122 requires districts to annually report to the CDE on the condition of their district school libraries. This survey is conducted online via the CDE's web site website.

The district shall, on or before August 31 each year, report to the ~~CDE~~ California Department of Education on the condition of its school libraries for the preceding year ending June 30. (Education Code 18122)

Policy Reference UPDATE Service

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Policy Reference Disclaimer:

These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State

5 CCR 16040-16043

Description

School libraries

5 CCR 80023-80023.2	Emergency permits; general requirements
5 CCR 80024.6	Emergency teacher librarian services permit
5 CCR 80026-80026.6	Emergency permits; Declaration of Need
5 CCR 80053-80053.1	Teacher librarian services credential
Ed. Code 1703	Coordination of district library services by county superintendent
Ed. Code 1770-1775	Provision of library services by county superintendent
Ed. Code 18100-18203	School libraries
Ed. Code 18300-18571	Union high school district/unified school district libraries
Ed. Code 19335-19336	Reading Initiative Program; recommended books
Ed. Code 220	Prohibition of discrimination
Ed. Code 242	Access to information about educational laws and policies regarding right to accurate and inclusive curriculum
Ed. Code 35021	Volunteer aides
Ed. Code 44868-44869	Qualifications and employment of library media teachers
Ed. Code 45340-45349	Instructional aides
Ed. Code 48907	Exercise of free expression; time, place and manner rules and regulations
Ed. Code 48950	Speech and other communication
Ed. Code 51204.5	Social sciences instruction; contributions of specified groups
Ed. Code 51501	Nondiscriminatory subject matter
Ed. Code 60040 - 60052	Requirements for instructional materials
Management Resources	Description
California Department of Education Publication	Examples of Model School Library Standards for California Public Schools Supporting Common Core State Standards (CCSS,) for English Language Arts & Literacy in History/Social Studies, Science, and Technical Subjects , rev. February 2012
California Department of Education Publication	Looking at the School Library: An Evaluation Tool, 2003
California Department of Education Publication	Model School Library Standards for California Public Schools: K - 12, 2010 (includes standards for student instruction as well as program standards)

California Department of Education Publication	Recommended Literature: Kindergarten Through Grade Twelve
California School Library Association Publication	Standards and Guidelines for Strong School Libraries, 2004
Website	CSBA District and County Office of Education Legal Services
Website	American Association of School Libraries
Website	California Department of Education, Curriculum and Instruction Resources (https://www.cde.ca.gov/ci/cr/)
Website	California Department of Education, School Libraries
Website	California School Library Association
Website	Department of Justice (https://oag.ca.gov/)
Website	U.S. Department of Education, Office for Civil Rights (https://www2.ed.gov/about/offices/list/ocr/index.html)

Cross References

Code	Description
0200	Goals For The School District
0400	Comprehensive Plans
0410	Nondiscrimination in District Programs and Activities
0420	School Plans/Site Councils
0420	School Plans/Site Councils
0440	District Technology Plan
0440	District Technology Plan
0460	Local Control And Accountability Plan
0460	Local Control And Accountability Plan
1240	Volunteer Assistance
1240	Volunteer Assistance
1260	Educational Foundation
1312.2	Complaints Concerning Instructional Materials
1312.2	Complaints Concerning Instructional Materials
1312.2-E(1)	Complaints Concerning Instructional Materials
1312.3	Uniform Complaint Procedures

1312.4

1330.1

1340

1340

3260

3260

3270

3270

3290

3311

3311

4112.2

4112.2

4113

4113

4131

4132

4222

4222

4231

4232

4331

4332

5125.2

5145.3

6011

6141

6141

6142.2

Williams Uniform Complaint Procedures

Joint Use Agreements

Access To District Records

Access To District Records

Fees And Charges

Fees And Charges

Sale And Disposal Of Books, Equipment And Supplies

Sale And Disposal Of Books, Equipment And Supplies

Gifts, Grants And Bequests

Bids

Bids

Certification

Certification

Assignment

Assignment

Staff Development

Publication Or Creation Of Materials

Teacher Aides/Paraprofessionals

Teacher Aides/Paraprofessionals

Staff Development

Publication Or Creation Of Materials

Staff Development

Publication Or Creation Of Materials

Withholding Grades, Diploma Or Transcripts

Nondiscrimination/Harassment

Academic Standards

Curriculum Development And Evaluation

Curriculum Development And Evaluation

World Language Instruction

6142.2	World Language Instruction
6142.6	Visual And Performing Arts Education
6142.91	Reading/Language Arts Instruction
6142.92	Mathematics Instruction
6142.94	History-Social Science Instruction
<u>6143</u>	<u>Courses Of Study</u>
6144	Controversial Issues
6154	Homework/Makeup Work
6161.1	Selection And Evaluation Of Instructional Materials
6161.1	Selection And Evaluation Of Instructional Materials
6161.1-E(1)	Selection And Evaluation Of Instructional Materials
6161.11	Supplementary Instructional Materials
6161.2	Damaged Or Lost Instructional Materials
6162.6	Use Of Copyrighted Materials
6162.6	Use Of Copyrighted Materials
6163.4	Student Use Of Technology
6163.4-E(1)	Student Use Of Technology
7110	Facilities Master Plan

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: X

From: Katherine Wright, Superintendent

Item Number: 13

Type of item: (Action, Consent Action or Information Only): Action

SUBJECT:

Request to Approve the Proposed Districtwide Calendar for the 2024-2025, 2025-2026 and 2026-2027 School Years.

BACKGROUND:

Superintendent Wright and representatives from RDUTA and CSEA met to set criteria, draft several calendars options, and distribute those options to all affected employees to vote on. The survey also conveyed that, from whichever calendar received the most votes, a 2025-2026 and 2026-2027 calendar would be created to be submitted for approval along with the 2024-2025 Calendar to the Board.

STATUS:

The attached draft of the 2024-2025 Districtwide Calendar has been reviewed and received the majority of both bargaining units. A 2025-2026 and 2026-2027 calendar was created to mimic the 2024-2025 districtwide calendar and submitted for approval.

PRESENTER:

Katherine Wright, Superintendent

OTHER PEOPLE WHO MIGHT BE PRESENT:

Staff

COST AND FUNDING SOURCES:

RECOMMENDATION:

That the Board approves the proposed Districtwide Calendar for the 2024-2025, 2025-2026 and 2026-2027 school years.

Time allocated: 3 minutes

2024-2025 RIVER DELTA UNIFIED SCHOOL DISTRICT CALENDAR

MONTH	FIRST WEEK					SECOND WEEK					THIRD WEEK					FOURTH WEEK					FIFTH WEEK					#
	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	
JULY	1	2	3	4	5	8	9	10	11	12	15	16	17	18	19	22	23	24	25	26	29	30	31			0
AUGUST				1	2	5	6	7 ^{SS}	8	9	12	13	14	15	16	19	20	21	22	23	26	27	28	29	30	18
SEPTEMBER	2	3	4	5	6	9	10	11	12	13	16	17	18	19	20	23	24	25	26	27	30					20
OCTOBER		1	2	3	4	7	8	9	10	11	14	15	16	17	18	21	22	23	24	25	28	29	30	31		23
NOVEMBER					1	4	5	6	7	8	11	12	13	14	15	18	19	20	21	22	25	26	27	28	29	14
DECEMBER	2	3	4	5	6	9	10	11	12	13	16	17	18	19	20	23	24	25	26	27	30	31				15
JANUARY			1	2	3	6	7	8	9	10	13	14	15	16	17	20	21	22	23	24	27	28	29	30	31	14
FEBRUARY	3	4	5	6	7	10	11	12	13	14	17	18	19	20	21	24	25	26	27	28						14
MARCH	3	4	5	6	7	10	11	12	13	14	17	18	19	20	21	24	25	26	27	28	31					16
APRIL		1	2	3	4	7	8	9	10	11	14	15	16	17	18	21	22	23	24	25	28	29	30			20
MAY				1	2	5	6	7	8	9	12	13	14	15	16	19	20	21	22	23	26	27	28	29	30	21
JUNE	2	3	4	5	6	9	10	11	12	13	16	17	18	19	20	23	24	25	26	27	30					5

TOTAL DAYS

TOTAL STUDENT DAYS

180

- = Non Student Days/Recess
- = Legal Holidays
- = Board Granted Holidays
- = Minimum Days
- = Teacher Pre-Service Days
- = Staff Development Days

SS = School Begins = August 7, 2024

SE = School Ends = June 6, 2025

P = Parent Conference Days = October 4, 8, 10, 11, 2024

Thanksgiving Break = November 25—29, 2024

Winter Break = December 23, 2024—January 10, 2025

February Break = February 17-24, 2025

Spring Break = March 24-28, 2025 & April 18 & 21, 2025

Quarter **Days**

Quarter 1 – Ends October 4, 2024 42

Quarter 2 – Ends December 20, 2024 48

Quarter 3 – Ends March 21, 2025 43

Quarter 4 – Ends June 6, 2025 47

2025-2026 RIVER DELTA UNIFIED SCHOOL DISTRICT CALENDAR

MONTH	FIRST WEEK					SECOND WEEK					THIRD WEEK					FOURTH WEEK					FIFTH WEEK					#			
	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F				
JULY		1	2	3	4	7	8	9	10	11	14	15	16	17	18	21	22	23	24	25	28	29	30	31					0
AUGUST					1	4	5	6 ^{SS}	7	8	11	12	13	14	15	18	19	20	21	22	25	26	27	28	29	18			
SEPTEMBER	1	2	3	4	5	8	9	10	11	12	15	16	17	18	19	22	23	24	25	26	29	30				21			
OCTOBER			1	2	3	6	7	8	9	10	13	14	15	16	17	20	21	22	23	24	27	28	29	30	31	22			
NOVEMBER	3	4	5	6	7	10	11	12	13	14	17	18	19	20	21	24	25	26	27	28						14			
DECEMBER	1	2	3	4	5	8	9	10	11	12	15	16	17	18	19	22	23	24	25	26	29	30	31			15			
JANUARY				1	2	5	6	7	8	9	12	13	14	15	16	19	20	21	22	23	26	27	28	29	30	14			
FEBRUARY	2	3	4	5	6	9	10	11	12	13	16	17	18	19	20	23	24	25	26	27						14			
MARCH	2	3	4	5	6	9	10	11	12	13	16	17	18	19	20	23	24	25	26	27	30	31				17			
APRIL			1	2	3	6	7	8	9	10	13	14	15	16	17	20	21	22	23	24	27	28	29	30		20			
MAY					1	4	5	6	7	8	11	12	13	14	15	18	19	20	21	22	25	26	27	28	29	20			
JUNE	1	2	3	4	5 ^{SE}	8	9	10	11	12	15	16	17	18	19	22	23	24	25	26	29	30				5			
TOTAL DAYS																									TOTAL STUDENT DAYS	180			

- = Non Student Days/Recess
- = Legal Holidays
- = Board Granted Holidays
- = Minimum Days
- = Teacher Pre-Service Days
- = Staff Development Days

SS = School Begins = August 6, 2025

SE = School Ends = June 5, 2026

P = Parent Conference Days = October 3, 7, 9, 10, 2025

Thanksgiving Break = November 24–28, 2025

Winter Break = December 22, 2025—January 9, 2026

February Break = February 16-23, 2026

Spring Break = March 23-27, 2026 & April 3 & 6, 2026

Quarter	Days
Quarter 1 – Ends October 3, 2025	42
Quarter 2 – Ends December 19, 2025	48
Quarter 3 – Ends March 20, 2026	43
Quarter 4 – Ends June 5, 2026	47

2026-2027 RIVER DELTA UNIFIED SCHOOL DISTRICT CALENDAR

MONTH	FIRST WEEK					SECOND WEEK					THIRD WEEK					FOURTH WEEK					FIFTH WEEK					#
	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	
JULY			1	2	3	6	7	8	9	10	13	14	15	16	17	20	21	22	23	24	27	28	29	30	31	0
AUGUST	3	4	5	6 ^{SS}	7	10	11	12	13	14	17	18	19	20	21	24	25	26	27	28	31					18
SEPTEMBER		1	2	3	4	7	8	9	10	11	14	15	16	17	18	21	22	23	24	25	28	29	30			21
OCTOBER				1	2	5	6	7	8	9	12	13	14	15	16	19	20	21	22	23	26	27	28	29	30	22
NOVEMBER	2	3	4	5	6	9	10	11	12	13	16	17	18	19	20	23	24	25	26	27	30					15
DECEMBER		1	2	3	4	7	8	9	10	11	14	15	16	17	18	21	22	23	24	25	28	29	30	31		14
JANUARY					1	4	5	6	7	8	11	12	13	14	15	18	19	20	21	22	25	26	27	28	29	14
FEBRUARY	1	2	3	4	5	8	9	10	11	12	15	16	17	18	19	22	23	24	25	26						14
MARCH	1	2	3	4	5	8	9	10	11	12	15	16	17	18	19	22	23	24	25	26	29	30	31			18
APRIL				1	2	5	6	7	8	9	12	13	14	15	16	19	20	21	22	23	26	27	28	29	30	20
MAY	3	4	5	6	7	10	11	12	13	14	17	18	19	20	21	24	25	26	27	28	31					20
JUNE		1	2	3	4 ^{SE}	7	8	9	10	11	14	15	16	17	18	21	22	23	24	25	28	29	30			4

TOTAL DAYS

TOTAL STUDENT DAYS

180

- = Non Student Days/Recess
- = Legal Holidays
- = Board Granted Holidays
- = Minimum Days
- = Teacher Pre-Service Days
- = Staff Development Days

SS = School Begins = August 6, 2026

SE = School Ends = June 4, 2027

P = Parent Conference Days = October 2, 6, 8, 9, 2026

Thanksgiving Break = November 23—27, 2026

Winter Break = December 21, 2026—January 8, 2027

February Break = February 15-22, 2027

Spring Break = March 22-26, 2027 & April 2 & 5, 2027

Quarter **Days**

Quarter 1 – Ends October 2, 2026 41

Quarter 2 – Ends December 18, 2026 49

Quarter 3 – Ends March 19, 2027 43

Quarter 4 – Ends June 4, 2027 47

Draft December 12, 2023

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: x

From: Tammy Busch, Asst. Superintendent of Business Services Item Number: 14

Type of item: (Action, Consent Action or Information Only): Action Item

SUBJECT:

Request the Approval of First Interim Financial Report for Fiscal Year 2023-2024

BACKGROUND:

Since the budget adoption in June of 2023, revisions have been made to keep the budget current with changing circumstances and requirements. The purpose of the interim financial report is to project the total revenues and expenditures for the current fiscal year, compare the projected totals to the revised budget, perform a summary review of the report according to the State's criteria and standards, and to certify the financial condition of the River Delta School District to the Sacramento County Superintendents of Schools and the California Department of Education (pursuant to Education codes 42130-31 and 33127).

STATUS:

The First Interim Report reflects the financial activity from July 1, 2023 through October 31, 2023. Upon Board review and approval the report is reviewed by Sacramento County Office of Education.

PRESENTER:

Tammy Busch, Asst. Superintendent of Business Services

OTHER PEOPLE WHO MIGHT BE PRESENT:

COST AND FUNDING SOURCES:

RECOMMENDATION:

That the Board approves the First Interim Financial Report for Fiscal Year 2023-24.

Time allocated: 15 minutes

1st Interim Assumptions

ADA/Enrollment –

Budget Adoption ADA		1 st Interim ADA
2023-24	1703.30	1607
2024-25	1627.19	1613
2025-26	1615.27	1613

COLA –

Average 4 years to get 3.4% for 2024/25 instead of 3.94% on School Services of California (SSC) Dartboard. 3.29% was used for 2025-26

LCFF and Revenue

Increased 3.5% for 2023-24 from budget adoption; 7.9% for 2024-25 and 12.4% for 2025-26. One reason is property tax revenues have increased.

State Revenue is projected to increase due to more mental health services funding received, STRS on behalf and increase in classified employees participating in summer program.

Other Assumptions

Federal revenue and expenditures dramatically decreased as COVID one-time funds will end as of 9/30/24.

2025-26 the district will need to be conservative to maintain a positive ending balance.

Projected Deficit spending 8.1% (\$4,035,893) for 2023-24, 5.5% for 2024-25, and 3.2% for 2025-26.

Projected Ending Balance for 2023-24 \$5,637,975; for 2024-25 \$4,626,584; and for 2025-26 \$3,973,049

Fund 01 – 10% changes from adopted budget

Salaries and benefits have been increased for the recent 8% salary negotiated; however the decrease from adopted budget is due to position control not appropriately adding to budget and was over budgeted in July.

Capital Outlay increased due to using deferred maintenance funds for district required repairs.

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
A. REVENUES								
1) LCFF Sources		8010-8099	24,187,648.00	24,187,648.00	3,317,424.46	24,713,930.00	526,282.00	2.2%
2) Federal Revenue		8100-8299	0.00	0.00	0.00	0.00	0.00	0.0%
3) Other State Revenue		8300-8599	378,375.34	378,375.34	30,881.71	378,375.34	0.00	0.0%
4) Other Local Revenue		8600-8799	265,243.27	265,243.27	180,560.25	265,313.13	69.86	0.0%
5) TOTAL, REVENUES			24,831,266.61	24,831,266.61	3,528,866.42	25,357,618.47		
B. EXPENDITURES								
1) Certificated Salaries		1000-1999	9,433,081.00	9,433,081.00	2,684,747.18	9,309,471.06	123,609.94	1.3%
2) Classified Salaries		2000-2999	3,005,580.00	3,005,580.00	1,015,467.35	3,386,626.51	(381,046.51)	-12.7%
3) Employee Benefits		3000-3999	4,038,664.36	4,038,664.36	1,516,943.35	5,046,005.34	(1,007,340.98)	-24.9%
4) Books and Supplies		4000-4999	556,741.57	556,741.57	122,410.30	669,315.29	(112,573.72)	-20.2%
5) Services and Other Operating Expenditures		5000-5999	3,173,677.21	3,173,677.21	1,090,453.47	3,244,556.40	(70,879.19)	-2.2%
6) Capital Outlay		6000-6999	130,000.00	130,000.00	334,227.72	437,586.03	(307,586.03)	-236.6%
7) Other Outgo (excluding Transfers of Indirect Costs)		7100-7299 7400-7499	52,000.00	52,000.00	19,432.00	52,000.00	0.00	0.0%
8) Other Outgo - Transfers of Indirect Costs		7300-7399	(84,350.93)	(84,350.93)	0.00	(47,065.93)	(37,285.00)	44.2%
9) TOTAL, EXPENDITURES			20,305,393.21	20,305,393.21	6,783,681.37	22,098,494.70		
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B9)			4,525,873.40	4,525,873.40	(3,254,814.95)	3,259,123.77		
D. OTHER FINANCING SOURCES/USES								
1) Interfund Transfers								
a) Transfers In		8900-8929	0.00	0.00	0.00	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.00	0.00	0.00	0.0%
2) Other Sources/Uses								
a) Sources		8930-8979	0.00	0.00	0.00	0.00	0.00	0.0%
b) Uses		7630-7699	0.00	0.00	0.00	0.00	0.00	0.0%
3) Contributions		8980-8999	(5,205,852.15)	(5,205,852.15)	(9,630.00)	(5,054,413.84)	151,438.31	-2.9%
4) TOTAL, OTHER FINANCING SOURCES/USES			(5,205,852.15)	(5,205,852.15)	(9,630.00)	(5,054,413.84)		
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)			(679,978.75)	(679,978.75)	(3,264,444.95)	(1,795,290.07)		
F. FUND BALANCE, RESERVES								
1) Beginning Fund Balance								
a) As of July 1 - Unaudited		9791	9,343,971.65	9,343,971.65		9,343,971.65	0.00	0.0%
b) Audit Adjustments		9793	0.00	0.00		0.00	0.00	0.0%
c) As of July 1 - Audited (F1a + F1b)			9,343,971.65	9,343,971.65		9,343,971.65		
d) Other Restatements		9795	0.00	0.00		0.00	0.00	0.0%
e) Adjusted Beginning Balance (F1c + F1d)			9,343,971.65	9,343,971.65		9,343,971.65		
2) Ending Balance, June 30 (E + F1e)			8,663,992.90	8,663,992.90		7,548,681.58		
Components of Ending Fund Balance								
a) Nonspendable								
Revolving Cash		9711	15,000.00	15,000.00		15,000.00		
Stores		9712	0.00	0.00		0.00		

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Prepaid Items		9713	0.00	0.00		0.00		
All Others		9719	0.00	0.00		0.00		
b) Restricted		9740	0.00	0.00		0.00		
c) Committed								
Stabilization Arrangements		9750	0.00	0.00		0.00		
Other Commitments		9760	0.00	0.00		0.00		
d) Assigned								
Other Assignments		9780	0.00	0.00		0.00		
e) Unassigned/Unappropriated								
Reserve for Economic Uncertainties		9789	1,848,749.00	1,848,749.00		1,895,706.00		
Unassigned/Unappropriated Amount		9790	6,800,243.90	6,800,243.90		5,637,975.58		
LCFF SOURCES								
Principal Apportionment								
State Aid - Current Year		8011	10,883,902.00	10,883,902.00	3,126,160.00	11,363,591.00	479,689.00	4.4%
Education Protection Account State Aid - Current Year		8012	751,335.00	751,335.00	367,170.00	341,720.00	(409,615.00)	-54.5%
State Aid - Prior Years		8019	528,204.00	528,204.00	239,842.00	157,414.00	(370,790.00)	-70.2%
Tax Relief Subventions								
Homeowners' Exemptions		8021	69,314.00	69,314.00	759.86	69,314.00	0.00	0.0%
Timber Yield Tax		8022	0.00	0.00	0.00	0.00	0.00	0.0%
Other Subventions/In-Lieu Taxes		8029	0.00	0.00	0.00	0.00	0.00	0.0%
County & District Taxes								
Secured Roll Taxes		8041	11,712,249.00	11,712,249.00	71,030.84	13,078,851.00	1,366,602.00	11.7%
Unsecured Roll Taxes		8042	909,453.00	909,453.00	10,098.23	997,661.00	88,208.00	9.7%
Prior Years' Taxes		8043	(13,788.00)	(13,788.00)	1,254.53	(10,723.00)	3,065.00	-22.2%
Supplemental Taxes		8044	207,686.00	207,686.00	0.00	225,965.00	18,279.00	8.8%
Education Revenue Augmentation Fund (ERAF)		8045	351,841.00	351,841.00	0.00	508,305.00	156,464.00	44.5%
Community Redevelopment Funds (SB 617/699/1992)		8047	806,787.00	806,787.00	0.00	1,167.00	(805,620.00)	-99.9%
Penalties and Interest from Delinquent Taxes		8048	0.00	0.00	0.00	0.00	0.00	0.0%
Miscellaneous Funds (EC 41604)								
Royalties and Bonuses		8081	0.00	0.00	5,700.00	0.00	0.00	0.0%
Other In-Lieu Taxes		8082	0.00	0.00	0.00	0.00	0.00	0.0%
Less: Non-LCFF (50%) Adjustment		8089	0.00	0.00	0.00	0.00	0.00	0.0%
Subtotal, LCFF Sources			26,206,983.00	26,206,983.00	3,822,015.46	26,733,265.00	526,282.00	2.0%
LCFF Transfers								
Unrestricted LCFF								
Transfers - Current Year	0000	8091	0.00	0.00	0.00	0.00	0.00	0.0%
All Other LCFF Transfers - Current Year	All Other	8091	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers to Charter Schools in Lieu of Property Taxes		8096	(2,019,335.00)	(2,019,335.00)	(504,591.00)	(2,019,335.00)	0.00	0.0%
Property Taxes Transfers		8097	0.00	0.00	0.00	0.00	0.00	0.0%
LCFF/Revenue Limit Transfers - Prior Years		8099	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, LCFF SOURCES			24,187,648.00	24,187,648.00	3,317,424.46	24,713,930.00	526,282.00	2.2%

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
FEDERAL REVENUE								
Maintenance and Operations		8110	0.00	0.00	0.00	0.00	0.00	0.0%
Special Education Entitlement		8181	0.00	0.00	0.00	0.00		
Special Education Discretionary Grants		8182	0.00	0.00	0.00	0.00		
Child Nutrition Programs		8220	0.00	0.00	0.00	0.00		
Donated Food Commodities		8221	0.00	0.00	0.00	0.00		
Forest Reserve Funds		8260	0.00	0.00	0.00	0.00	0.00	0.0%
Flood Control Funds		8270	0.00	0.00	0.00	0.00	0.00	0.0%
Wildlife Reserve Funds		8280	0.00	0.00	0.00	0.00	0.00	0.0%
FEMA		8281	0.00	0.00	0.00	0.00	0.00	0.0%
Interagency Contracts Between LEAs		8285	0.00	0.00	0.00	0.00	0.00	0.0%
Pass-Through Revenues from Federal Sources		8287	0.00	0.00	0.00	0.00		
Title I, Part A, Basic	3010	8290						
Title I, Part D, Local Delinquent Programs	3025	8290						
Title II, Part A, Supporting Effective Instruction	4035	8290						
Title III, Part A, Immigrant Student Program	4201	8290						
Title III, Part A, English Learner Program	4203	8290						
Public Charter Schools Grant Program (PCSGP)	4610	8290						
Other NCLB / Every Student Succeeds Act	3040, 3060, 3061, 3110, 3150, 3155, 3180, 3182, 4037, 4123, 4124, 4126, 4127, 4128, 5630	8290						
Career and Technical Education	3500-3599	8290						
All Other Federal Revenue	All Other	8290	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, FEDERAL REVENUE			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER STATE REVENUE								
Other State Apportionments								
ROC/P Entitlement								
Prior Years	6360	8319						
Special Education Master Plan								
Current Year	6500	8311						
Prior Years	6500	8319						
All Other State Apportionments - Current Year	All Other	8311	0.00	0.00	0.00	0.00	0.00	0.0%
All Other State Apportionments - Prior Years	All Other	8319	0.00	0.00	0.00	0.00	0.00	0.0%
Child Nutrition Programs		8520	0.00	0.00	0.00	0.00		
Mandated Costs Reimbursements		8550	78,425.00	78,425.00	0.00	78,425.00	0.00	0.0%
Lottery - Unrestricted and Instructional Materials		8560	261,289.00	261,289.00	26,667.34	261,289.00	0.00	0.0%
Tax Relief Subventions								
Restricted Levies - Other								
Homeowners' Exemptions		8575	0.00	0.00	0.00	0.00		
Other Subventions/In-Lieu Taxes		8576	0.00	0.00	0.00	0.00		

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Pass-Through Revenues from State Sources		8587	0.00	0.00	0.00	0.00	0.00	0.0%
After School Education and Safety (ASES)	6010	8590						
Charter School Facility Grant	6030	8590						
Career Technical Education Incentive Grant Program	6387	8590						
Drug/Alcohol/Tobacco Funds	6650, 6690, 6695	8590						
California Clean Energy Jobs Act	6230	8590						
Specialized Secondary	7370	8590						
American Indian Early Childhood Education	7210	8590						
All Other State Revenue	All Other	8590	38,661.34	38,661.34	4,214.37	38,661.34	0.00	0.0%
TOTAL, OTHER STATE REVENUE			378,375.34	378,375.34	30,881.71	378,375.34	0.00	0.0%
OTHER LOCAL REVENUE								
Other Local Revenue								
County and District Taxes								
Other Restricted Levies								
Secured Roll		8615	0.00	0.00	0.00	0.00		
Unsecured Roll		8616	0.00	0.00	0.00	0.00		
Prior Years' Taxes		8617	0.00	0.00	0.00	0.00		
Supplemental Taxes		8618	0.00	0.00	0.00	0.00		
Non-Ad Valorem Taxes								
Parcel Taxes		8621	0.00	0.00	0.00	0.00	0.00	0.0%
Other		8622	0.00	0.00	0.00	0.00	0.00	0.0%
Community Redevelopment Funds Not Subject to LCFF Deduction		8625	0.00	0.00	0.00	0.00		
Penalties and Interest from Delinquent Non-LCFF Taxes		8629	0.00	0.00	0.00	0.00		
Sales								
Sale of Equipment/Supplies		8631	0.00	0.00	0.00	0.00	0.00	0.0%
Sale of Publications		8632	0.00	0.00	0.00	0.00	0.00	0.0%
Food Service Sales		8634	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Sales		8639	0.00	0.00	0.00	0.00	0.00	0.0%
Leases and Rentals		8650	10,400.00	10,400.00	19,353.06	10,400.00	0.00	0.0%
Interest		8660	147,982.00	147,982.00	0.00	147,982.00	0.00	0.0%
Net Increase (Decrease) in the Fair Value of Investments		8662	0.00	0.00	63,296.18	0.00	0.00	0.0%
Fees and Contracts								
Adult Education Fees		8671	0.00	0.00	0.00	0.00	0.00	0.0%
Non-Resident Students		8672	0.00	0.00	0.00	0.00	0.00	0.0%
Transportation Fees From Individuals		8675	0.00	0.00	0.00	0.00	0.00	0.0%
Interagency Services		8677	35,997.46	35,997.46	9,859.00	35,997.46	0.00	0.0%
Mitigation/Developer Fees		8681	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Fees and Contracts		8689	0.00	0.00	0.00	0.00	0.00	0.0%
Other Local Revenue								
Plus: Misc Funds Non-LCFF (50%) Adjustment		8691	0.00	0.00	0.00	0.00	0.00	0.0%
Pass-Through Revenues From Local Sources		8697	0.00	0.00	0.00	0.00		

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
All Other Local Revenue		8699	50,863.81	50,863.81	88,052.01	50,933.67	69.86	0.1%
Tuition		8710	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers In		8781-8783	20,000.00	20,000.00	0.00	20,000.00	0.00	0.0%
Transfers Of Apportionments								
Special Education SELPA Transfers								
From Districts or Charter Schools	6500	8791						
From County Offices	6500	8792						
From JPAs	6500	8793						
ROC/P Transfers								
From Districts or Charter Schools	6360	8791						
From County Offices	6360	8792						
From JPAs	6360	8793						
Other Transfers of Apportionments								
From Districts or Charter Schools	All Other	8791	0.00	0.00	0.00	0.00	0.00	0.0%
From County Offices	All Other	8792	0.00	0.00	0.00	0.00	0.00	0.0%
From JPAs	All Other	8793	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers In from All Others		8799	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER LOCAL REVENUE			265,243.27	265,243.27	180,560.25	265,313.13	69.86	0.0%
TOTAL, REVENUES			24,831,266.61	24,831,266.61	3,528,866.42	25,357,618.47	526,351.86	2.1%
CERTIFICATED SALARIES								
Certificated Teachers' Salaries		1100	7,562,624.00	7,562,624.00	2,005,899.40	7,110,472.34	452,151.66	6.0%
Certificated Pupil Support Salaries		1200	696,631.00	696,631.00	234,971.94	771,873.00	(75,242.00)	-10.8%
Certificated Supervisors' and Administrators' Salaries		1300	1,173,826.00	1,173,826.00	443,875.84	1,427,125.72	(253,299.72)	-21.6%
Other Certificated Salaries		1900	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CERTIFICATED SALARIES			9,433,081.00	9,433,081.00	2,684,747.18	9,309,471.06	123,609.94	1.3%
CLASSIFIED SALARIES								
Classified Instructional Salaries		2100	69,407.00	69,407.00	38,308.32	154,279.30	(84,872.30)	-122.3%
Classified Support Salaries		2200	1,320,995.00	1,320,995.00	416,152.53	1,527,856.48	(206,861.48)	-15.7%
Classified Supervisors' and Administrators' Salaries		2300	177,326.00	177,326.00	155,425.61	429,569.69	(252,243.69)	-142.2%
Clerical, Technical and Office Salaries		2400	1,270,392.00	1,270,392.00	377,398.68	1,183,675.37	86,716.63	6.8%
Other Classified Salaries		2900	167,460.00	167,460.00	28,182.21	91,245.67	76,214.33	45.5%
TOTAL, CLASSIFIED SALARIES			3,005,580.00	3,005,580.00	1,015,467.35	3,386,626.51	(381,046.51)	-12.7%
EMPLOYEE BENEFITS								
STRS		3101-3102	943,917.83	943,917.83	479,901.76	1,699,918.62	(756,000.79)	-80.1%
PERS		3201-3202	830,857.65	830,857.65	280,784.06	942,712.68	(111,855.03)	-13.5%
OASDI/Medicare/Alternative		3301-3302	836,551.48	836,551.48	124,272.43	446,799.98	389,751.50	46.6%
Health and Welfare Benefits		3401-3402	1,134,055.00	1,134,055.00	521,385.59	1,619,082.38	(485,027.38)	-42.8%
Unemployment Insurance		3501-3502	154,355.28	154,355.28	2,256.30	11,868.47	142,486.81	92.3%
Workers' Compensation		3601-3602	82,291.12	82,291.12	51,105.11	185,009.35	(102,718.23)	-124.8%
OPEB, Allocated		3701-3702	0.00	0.00	22,989.98	0.00	0.00	0.0%
OPEB, Active Employees		3751-3752	38,436.00	38,436.00	33,538.56	122,413.86	(83,977.86)	-218.5%
Other Employee Benefits		3901-3902	18,200.00	18,200.00	709.56	18,200.00	0.00	0.0%
TOTAL, EMPLOYEE BENEFITS			4,038,664.36	4,038,664.36	1,516,943.35	5,046,005.34	(1,007,340.98)	-24.9%
BOOKS AND SUPPLIES								

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Approved Textbooks and Core Curricula Materials		4100	0.00	0.00	(583.99)	0.00	0.00	0.0%
Books and Other Reference Materials		4200	0.00	0.00	0.00	0.00	0.00	0.0%
Materials and Supplies		4300	474,622.57	474,622.57	92,616.28	581,817.43	(107,194.86)	-22.6%
Noncapitalized Equipment		4400	82,119.00	82,119.00	30,378.01	87,497.86	(5,378.86)	-6.6%
Food		4700	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, BOOKS AND SUPPLIES			556,741.57	556,741.57	122,410.30	669,315.29	(112,573.72)	-20.2%
SERVICES AND OTHER OPERATING EXPENDITURES								
Subagreements for Services		5100	100,000.00	100,000.00	11,050.40	25,000.00	75,000.00	75.0%
Travel and Conferences		5200	163,611.00	163,611.00	20,865.04	169,113.67	(5,502.67)	-3.4%
Dues and Memberships		5300	87,017.52	87,017.52	42,942.35	65,282.52	21,735.00	25.0%
Insurance		5400-5450	168,500.00	168,500.00	81,144.00	168,500.00	0.00	0.0%
Operations and Housekeeping Services		5500	1,169,831.00	1,169,831.00	317,463.74	1,169,831.00	0.00	0.0%
Rentals, Leases, Repairs, and Noncapitalized Improvements		5600	3,385.00	3,385.00	422.44	7,927.00	(4,542.00)	-134.2%
Transfers of Direct Costs		5710	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Direct Costs - Interfund		5750	0.00	0.00	0.00	0.00	0.00	0.0%
Professional/Consulting Services and Operating Expenditures		5800	1,183,192.90	1,183,192.90	549,161.69	1,329,839.42	(146,646.52)	-12.4%
Communications		5900	298,139.79	298,139.79	67,403.81	309,062.79	(10,923.00)	-3.7%
TOTAL, SERVICES AND OTHER OPERATING EXPENDITURES			3,173,677.21	3,173,677.21	1,090,453.47	3,244,556.40	(70,879.19)	-2.2%
CAPITAL OUTLAY								
Land		6100	0.00	0.00	0.00	0.00	0.00	0.0%
Land Improvements		6170	0.00	0.00	0.00	0.00	0.00	0.0%
Buildings and Improvements of Buildings		6200	0.00	0.00	0.00	0.00	0.00	0.0%
Books and Media for New School Libraries or Major Expansion of School Libraries		6300	0.00	0.00	0.00	0.00	0.00	0.0%
Equipment		6400	0.00	0.00	301,604.78	301,604.78	(301,604.78)	New
Equipment Replacement		6500	130,000.00	130,000.00	32,622.94	135,981.25	(5,981.25)	-4.6%
Lease Assets		6600	0.00	0.00	0.00	0.00	0.00	0.0%
Subscription Assets		6700	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CAPITAL OUTLAY			130,000.00	130,000.00	334,227.72	437,586.03	(307,586.03)	-236.6%
OTHER OUTGO (excluding Transfers of Indirect Costs)								
Tuition								
Tuition for Instruction Under Interdistrict								
Attendance Agreements		7110	0.00	0.00	0.00	0.00	0.00	0.0%
State Special Schools		7130	0.00	0.00	0.00	0.00	0.00	0.0%
Tuition, Excess Costs, and/or Deficit Payments								
Payments to Districts or Charter Schools		7141	0.00	0.00	0.00	0.00	0.00	0.0%
Payments to County Offices		7142	52,000.00	52,000.00	19,432.00	52,000.00	0.00	0.0%
Payments to JPAs		7143	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Pass-Through Revenues								
To Districts or Charter Schools		7211	0.00	0.00	0.00	0.00	0.00	0.0%
To County Offices		7212	0.00	0.00	0.00	0.00	0.00	0.0%
To JPAs		7213	0.00	0.00	0.00	0.00	0.00	0.0%

Revenues, Expenditures, and Changes in Fund Balance

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Special Education SELPA Transfers of Apportionments								
To Districts or Charter Schools	6500	7221						
To County Offices	6500	7222						
To JPAs	6500	7223						
ROC/P Transfers of Apportionments								
To Districts or Charter Schools	6360	7221						
To County Offices	6360	7222						
To JPAs	6360	7223						
Other Transfers of Apportionments	All Other	7221-7223	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers		7281-7283	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers Out to All Others		7299	0.00	0.00	0.00	0.00	0.00	0.0%
Debt Service								
Debt Service - Interest		7438	0.00	0.00	0.00	0.00	0.00	0.0%
Other Debt Service - Principal		7439	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER OUTGO (excluding Transfers of Indirect Costs)			52,000.00	52,000.00	19,432.00	52,000.00	0.00	0.0%
OTHER OUTGO - TRANSFERS OF INDIRECT COSTS								
Transfers of Indirect Costs		7310	(67,228.93)	(67,228.93)	0.00	(29,943.93)	(37,285.00)	55.5%
Transfers of Indirect Costs - Interfund		7350	(17,122.00)	(17,122.00)	0.00	(17,122.00)	0.00	0.0%
TOTAL, OTHER OUTGO - TRANSFERS OF INDIRECT COSTS			(84,350.93)	(84,350.93)	0.00	(47,065.93)	(37,285.00)	44.2%
TOTAL, EXPENDITURES			20,305,393.21	20,305,393.21	6,783,681.37	22,098,494.70	(1,793,101.49)	-8.8%
INTERFUND TRANSFERS								
INTERFUND TRANSFERS IN								
From: Special Reserve Fund		8912	0.00	0.00	0.00	0.00	0.00	0.0%
From: Bond Interest and Redemption Fund		8914	0.00	0.00	0.00	0.00	0.00	0.0%
Other Authorized Interfund Transfers In		8919	0.00	0.00	0.00	0.00	0.00	0.0%
(a) TOTAL, INTERFUND TRANSFERS IN			0.00	0.00	0.00	0.00	0.00	0.0%
INTERFUND TRANSFERS OUT								
To: Child Development Fund		7611	0.00	0.00	0.00	0.00	0.00	0.0%
To: Special Reserve Fund		7612	0.00	0.00	0.00	0.00	0.00	0.0%
To: State School Building Fund/ County School Facilities Fund		7613	0.00	0.00	0.00	0.00	0.00	0.0%
To: Cafeteria Fund		7616	0.00	0.00	0.00	0.00	0.00	0.0%
Other Authorized Interfund Transfers Out		7619	0.00	0.00	0.00	0.00	0.00	0.0%
(b) TOTAL, INTERFUND TRANSFERS OUT			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER SOURCES/USES								
SOURCES								
State Apportionments								
Emergency Apportionments		8931	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds								
Proceeds from Disposal of Capital Assets		8953	0.00	0.00	0.00	0.00	0.00	0.0%
Other Sources								
Transfers from Funds of Lapsed/Reorganized LEAs		8965	0.00	0.00	0.00	0.00	0.00	0.0%

2023-24 First Interim
General Fund
Unrestricted (Resources 0000-1999)
Revenues, Expenditures, and Changes in Fund Balance

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Long-Term Debt Proceeds								
Proceeds from Certificates of Participation		8971	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from Leases		8972	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from Lease Revenue Bonds		8973	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from SBITAs		8974	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Sources		8979	0.00	0.00	0.00	0.00	0.00	0.0%
(c) TOTAL, SOURCES			0.00	0.00	0.00	0.00	0.00	0.0%
USES								
Transfers of Funds from Lapsed/Reorganized LEAs		7651	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Uses		7699	0.00	0.00	0.00	0.00	0.00	0.0%
(d) TOTAL, USES			0.00	0.00	0.00	0.00	0.00	0.0%
CONTRIBUTIONS								
Contributions from Unrestricted Revenues		8980	(5,205,852.15)	(5,205,852.15)	(9,630.00)	(5,054,413.84)	151,438.31	-2.9%
Contributions from Restricted Revenues		8990	0.00	0.00	0.00	0.00	0.00	0.0%
(e) TOTAL, CONTRIBUTIONS			(5,205,852.15)	(5,205,852.15)	(9,630.00)	(5,054,413.84)	151,438.31	-2.9%
TOTAL, OTHER FINANCING SOURCES/USES (a - b + c - d + e)			(5,205,852.15)	(5,205,852.15)	(9,630.00)	(5,054,413.84)	151,438.31	-2.9%

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
A. REVENUES								
1) LCFF Sources		8010-8099	0.00	0.00	0.00	0.00	0.00	0.0%
2) Federal Revenue		8100-8299	4,464,003.04	4,464,003.04	606,240.88	4,299,686.93	(164,316.11)	-3.7%
3) Other State Revenue		8300-8599	2,754,739.23	2,754,739.23	1,331,192.78	3,313,627.27	558,888.04	20.3%
4) Other Local Revenue		8600-8799	898,029.39	898,029.39	408,556.62	907,291.19	9,261.80	1.0%
5) TOTAL, REVENUES			8,116,771.66	8,116,771.66	2,345,990.28	8,520,605.39		
B. EXPENDITURES								
1) Certificated Salaries		1000-1999	3,088,348.00	3,088,348.00	861,144.11	3,183,177.98	(94,829.98)	-3.1%
2) Classified Salaries		2000-2999	1,945,062.00	1,945,062.00	448,063.71	1,528,735.93	416,326.07	21.4%
3) Employee Benefits		3000-3999	3,007,108.12	3,007,108.12	498,875.45	2,634,654.53	372,453.59	12.4%
4) Books and Supplies		4000-4999	4,749,624.77	4,749,624.77	183,626.48	4,312,249.93	437,374.84	9.2%
5) Services and Other Operating Expenditures		5000-5999	2,001,041.91	2,001,041.91	580,463.47	2,931,577.31	(930,535.40)	-46.5%
6) Capital Outlay		6000-6999	1,811,173.60	1,811,173.60	113,343.24	1,195,283.02	615,890.58	34.0%
7) Other Outgo (excluding Transfers of Indirect Costs)		7100-7299 7400-7499	0.00	0.00	0.00	0.00	0.00	0.0%
8) Other Outgo - Transfers of Indirect Costs		7300-7399	67,228.93	67,228.93	0.00	29,943.93	37,285.00	55.5%
9) TOTAL, EXPENDITURES			16,669,587.33	16,669,587.33	2,685,516.46	15,815,622.63		
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B9)			(8,552,815.67)	(8,552,815.67)	(339,526.18)	(7,295,017.24)		
D. OTHER FINANCING SOURCES/USES								
1) Interfund Transfers								
a) Transfers In		8900-8929	0.00	0.00	0.00	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.00	0.00	0.00	0.0%
2) Other Sources/Uses								
a) Sources		8930-8979	0.00	0.00	0.00	0.00	0.00	0.0%
b) Uses		7630-7699	0.00	0.00	0.00	0.00	0.00	0.0%
3) Contributions		8980-8999	5,205,852.15	5,205,852.15	9,630.00	5,054,413.84	(151,438.31)	-2.9%
4) TOTAL, OTHER FINANCING SOURCES/USES			5,205,852.15	5,205,852.15	9,630.00	5,054,413.84		
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)			(3,346,963.52)	(3,346,963.52)	(329,896.18)	(2,240,603.40)		
F. FUND BALANCE, RESERVES								
1) Beginning Fund Balance								
a) As of July 1 - Unaudited		9791	5,754,001.01	5,754,001.01		5,754,001.01	0.00	0.0%
b) Audit Adjustments		9793	0.00	0.00		0.00	0.00	0.0%
c) As of July 1 - Audited (F1a + F1b)			5,754,001.01	5,754,001.01		5,754,001.01		
d) Other Restatements		9795	0.00	0.00		0.00	0.00	0.0%
e) Adjusted Beginning Balance (F1c + F1d)			5,754,001.01	5,754,001.01		5,754,001.01		
2) Ending Balance, June 30 (E + F1e)			2,407,037.49	2,407,037.49		3,513,397.61		
Components of Ending Fund Balance								
a) Nonspendable								
Revolving Cash		9711	0.00	0.00		0.00		
Stores		9712	0.00	0.00		0.00		
Prepaid Items		9713	0.00	0.00		0.00		

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
All Others		9719	0.00	0.00		0.00		
b) Restricted		9740	2,828,957.04	2,828,957.04		3,513,397.61		
c) Committed								
Stabilization Arrangements		9750	0.00	0.00		0.00		
Other Commitments		9760	0.00	0.00		0.00		
d) Assigned								
Other Assignments		9780	0.00	0.00		0.00		
e) Unassigned/Unappropriated								
Reserve for Economic Uncertainties		9789	0.00	0.00		0.00		
Unassigned/Unappropriated Amount		9790	(421,919.55)	(421,919.55)		0.00		
LCFF SOURCES								
Principal Apportionment								
State Aid - Current Year		8011	0.00	0.00	0.00	0.00		
Education Protection Account State Aid - Current Year		8012	0.00	0.00	0.00	0.00		
State Aid - Prior Years		8019	0.00	0.00	0.00	0.00		
Tax Relief Subventions								
Homeowners' Exemptions		8021	0.00	0.00	0.00	0.00		
Timber Yield Tax		8022	0.00	0.00	0.00	0.00		
Other Subventions/In-Lieu Taxes		8029	0.00	0.00	0.00	0.00		
County & District Taxes								
Secured Roll Taxes		8041	0.00	0.00	0.00	0.00		
Unsecured Roll Taxes		8042	0.00	0.00	0.00	0.00		
Prior Years' Taxes		8043	0.00	0.00	0.00	0.00		
Supplemental Taxes		8044	0.00	0.00	0.00	0.00		
Education Revenue Augmentation Fund (ERAF)		8045	0.00	0.00	0.00	0.00		
Community Redevelopment Funds (SB 617/699/1992)		8047	0.00	0.00	0.00	0.00		
Penalties and Interest from Delinquent Taxes		8048	0.00	0.00	0.00	0.00		
Miscellaneous Funds (EC 41604)								
Royalties and Bonuses		8081	0.00	0.00	0.00	0.00		
Other In-Lieu Taxes		8082	0.00	0.00	0.00	0.00		
Less: Non-LCFF								
(50%) Adjustment		8089	0.00	0.00	0.00	0.00		
Subtotal, LCFF Sources			0.00	0.00	0.00	0.00		
LCFF Transfers								
Unrestricted LCFF								
Transfers - Current Year	0000	8091						
All Other LCFF Transfers - Current Year	All Other	8091	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers to Charter Schools in Lieu of Property Taxes		8096	0.00	0.00	0.00	0.00		
Property Taxes Transfers		8097	0.00	0.00	0.00	0.00	0.00	0.0%
LCFF/Revenue Limit Transfers - Prior Years		8099	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, LCFF SOURCES			0.00	0.00	0.00	0.00	0.00	0.0%
FEDERAL REVENUE								

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Maintenance and Operations		8110	0.00	0.00	0.00	0.00	0.00	0.0%
Special Education Entitlement		8181	340,000.00	340,000.00	0.00	340,000.00	0.00	0.0%
Special Education Discretionary Grants		8182	26,725.00	26,725.00	0.00	86,312.00	59,587.00	223.0%
Child Nutrition Programs		8220	0.00	0.00	61,305.24	61,305.24	61,305.24	New
Donated Food Commodities		8221	0.00	0.00	0.00	0.00	0.00	0.0%
Forest Reserve Funds		8260	0.00	0.00	0.00	0.00		
Flood Control Funds		8270	0.00	0.00	0.00	0.00		
Wildlife Reserve Funds		8280	0.00	0.00	0.00	0.00		
FEMA		8281	0.00	0.00	0.00	0.00	0.00	0.0%
Interagency Contracts Between LEAs		8285	0.00	0.00	0.00	0.00	0.00	0.0%
Pass-Through Revenues from Federal Sources		8287	0.00	0.00	0.00	0.00	0.00	0.0%
Title I, Part A, Basic	3010	8290	663,741.04	663,741.04	25,190.92	663,741.04	0.00	0.0%
Title I, Part D, Local Delinquent Programs	3025	8290	0.00	0.00	0.00	0.00	0.00	0.0%
Title II, Part A, Supporting Effective Instruction	4035	8290	73,839.00	73,839.00	0.00	73,839.00	0.00	0.0%
Title III, Part A, Immigrant Student Program	4201	8290	0.00	0.00	0.00	0.00	0.00	0.0%
Title III, Part A, English Learner Program	4203	8290	58,907.00	58,907.00	3,272.00	62,768.36	3,861.36	6.6%
Public Charter Schools Grant Program (PCSGP)	4610	8290	0.00	0.00	0.00	0.00	0.00	0.0%
Other NCLB / Every Student Succeeds Act	3040, 3060, 3061, 3110, 3150, 3155, 3180, 3182, 4037, 4123, 4124, 4126, 4127, 4128, 5630	8290	0.00	0.00	0.00	0.00	0.00	0.0%
Career and Technical Education	3500-3599	8290	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Federal Revenue	All Other	8290	3,300,791.00	3,300,791.00	516,472.72	3,011,721.29	(289,069.71)	-8.8%
TOTAL, FEDERAL REVENUE			4,464,003.04	4,464,003.04	606,240.88	4,299,686.93	(164,316.11)	-3.7%
OTHER STATE REVENUE								
Other State Apportionments								
ROC/P Entitlement								
Prior Years	6360	8319	0.00	0.00	0.00	0.00	0.00	0.0%
Special Education Master Plan								
Current Year	6500	8311	0.00	0.00	0.00	0.00	0.00	0.0%
Prior Years	6500	8319	0.00	0.00	0.00	0.00	0.00	0.0%
All Other State Apportionments - Current Year	All Other	8311	0.00	0.00	0.00	0.00	0.00	0.0%
All Other State Apportionments - Prior Years	All Other	8319	0.00	0.00	0.00	0.00	0.00	0.0%
Child Nutrition Programs		8520	0.00	0.00	0.00	0.00	0.00	0.0%
Mandated Costs Reimbursements		8550	0.00	0.00	0.00	0.00		
Lottery - Unrestricted and Instructional Materials		8560	107,419.00	107,419.00	32,765.48	107,419.00	0.00	0.0%
Tax Relief Subventions								
Restricted Levies - Other								
Homeowners' Exemptions		8575	0.00	0.00	0.00	0.00	0.00	0.0%
Other Subventions/In-Lieu Taxes		8576	0.00	0.00	0.00	0.00	0.00	0.0%

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Pass-Through Revenues from State Sources		8587	0.00	0.00	0.00	0.00	0.00	0.0%
After School Education and Safety (ASES)	6010	8590	457,836.00	457,836.00	25,710.00	457,836.00	0.00	0.0%
Charter School Facility Grant	6030	8590	0.00	0.00	0.00	0.00	0.00	0.0%
Career Technical Education Incentive Grant Program	6387	8590	241,191.00	241,191.00	118,253.59	241,191.00	0.00	0.0%
Drug/Alcohol/Tobacco Funds	6650, 6690, 6695	8590	0.00	0.00	13,406.12	13,406.12	13,406.12	New
California Clean Energy Jobs Act	6230	8590	0.00	0.00	(9,630.00)	(9,630.00)	(9,630.00)	New
Specialized Secondary	7370	8590	0.00	0.00	62,861.77	0.00	0.00	0.0%
American Indian Early Childhood Education	7210	8590	0.00	0.00	0.00	0.00	0.00	0.0%
All Other State Revenue	All Other	8590	1,948,293.23	1,948,293.23	1,087,825.82	2,503,405.15	555,111.92	28.5%
TOTAL, OTHER STATE REVENUE			2,754,739.23	2,754,739.23	1,331,192.78	3,313,627.27	558,888.04	20.3%
OTHER LOCAL REVENUE								
Other Local Revenue								
County and District Taxes								
Other Restricted Levies								
Secured Roll		8615	0.00	0.00	0.00	0.00	0.00	0.0%
Unsecured Roll		8616	0.00	0.00	0.00	0.00	0.00	0.0%
Prior Years' Taxes		8617	0.00	0.00	0.00	0.00	0.00	0.0%
Supplemental Taxes		8618	0.00	0.00	0.00	0.00	0.00	0.0%
Non-Ad Valorem Taxes								
Parcel Taxes		8621	0.00	0.00	0.00	0.00	0.00	0.0%
Other		8622	0.00	0.00	0.00	0.00	0.00	0.0%
Community Redevelopment Funds Not Subject to LCFF Deduction		8625	0.00	0.00	0.00	0.00	0.00	0.0%
Penalties and Interest from Delinquent Non-LCFF Taxes		8629	0.00	0.00	0.00	0.00	0.00	0.0%
Sales								
Sale of Equipment/Supplies		8631	0.00	0.00	0.00	0.00	0.00	0.0%
Sale of Publications		8632	0.00	0.00	0.00	0.00	0.00	0.0%
Food Service Sales		8634	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Sales		8639	0.00	0.00	0.00	0.00	0.00	0.0%
Leases and Rentals		8650	0.00	0.00	0.00	0.00	0.00	0.0%
Interest		8660	0.00	0.00	0.00	0.00	0.00	0.0%
Net Increase (Decrease) in the Fair Value of Investments		8662	0.00	0.00	0.00	0.00	0.00	0.0%
Fees and Contracts								
Adult Education Fees		8671	0.00	0.00	0.00	0.00	0.00	0.0%
Non-Resident Students		8672	0.00	0.00	0.00	0.00	0.00	0.0%
Transportation Fees From Individuals		8675	0.00	0.00	0.00	0.00	0.00	0.0%
Interagency Services		8677	8,885.00	8,885.00	0.00	8,885.00	0.00	0.0%
Mitigation/Developer Fees		8681	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Fees and Contracts		8689	0.00	0.00	0.00	0.00	0.00	0.0%
Other Local Revenue								
Plus: Misc Funds Non-LCFF (50%) Adjustment		8691	0.00	0.00	0.00	0.00	0.00	0.0%
Pass-Through Revenues From Local Sources		8697	0.00	0.00	0.00	0.00	0.00	0.0%

Revenues, Expenditures, and Changes in Fund Balance

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
All Other Local Revenue		8699	375,963.39	375,963.39	17,262.97	385,225.19	9,261.80	2.5%
Tuition		8710	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers In		8781-8783	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers Of Apportionments								
Special Education SELPA Transfers								
From Districts or Charter Schools	6500	8791	0.00	0.00	0.00	0.00	0.00	0.0%
From County Offices	6500	8792	513,181.00	513,181.00	391,293.65	513,181.00	0.00	0.0%
From JPAs	6500	8793	0.00	0.00	0.00	0.00	0.00	0.0%
ROC/P Transfers								
From Districts or Charter Schools	6360	8791	0.00	0.00	0.00	0.00	0.00	0.0%
From County Offices	6360	8792	0.00	0.00	0.00	0.00	0.00	0.0%
From JPAs	6360	8793	0.00	0.00	0.00	0.00	0.00	0.0%
Other Transfers of Apportionments								
From Districts or Charter Schools	All Other	8791	0.00	0.00	0.00	0.00	0.00	0.0%
From County Offices	All Other	8792	0.00	0.00	0.00	0.00	0.00	0.0%
From JPAs	All Other	8793	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers In from All Others		8799	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER LOCAL REVENUE			898,029.39	898,029.39	408,556.62	907,291.19	9,261.80	1.0%
TOTAL, REVENUES			8,116,771.66	8,116,771.66	2,345,990.28	8,520,605.39	403,833.73	5.0%
CERTIFICATED SALARIES								
Certificated Teachers' Salaries		1100	1,959,980.00	1,959,980.00	528,410.11	1,858,500.76	101,479.24	5.2%
Certificated Pupil Support Salaries		1200	783,368.00	783,368.00	250,339.73	1,107,679.84	(324,311.84)	-41.4%
Certificated Supervisors' and Administrators' Salaries		1300	345,000.00	345,000.00	82,394.27	216,997.38	128,002.62	37.1%
Other Certificated Salaries		1900	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CERTIFICATED SALARIES			3,088,348.00	3,088,348.00	861,144.11	3,183,177.98	(94,829.98)	-3.1%
CLASSIFIED SALARIES								
Classified Instructional Salaries		2100	1,283,599.00	1,283,599.00	249,985.23	891,502.70	392,096.30	30.5%
Classified Support Salaries		2200	440,916.00	440,916.00	135,981.43	461,838.36	(20,922.36)	-4.7%
Classified Supervisors' and Administrators' Salaries		2300	0.00	0.00	23,839.84	85,900.00	(85,900.00)	New
Clerical, Technical and Office Salaries		2400	170,063.00	170,063.00	33,556.05	84,793.71	85,269.29	50.1%
Other Classified Salaries		2900	50,484.00	50,484.00	4,701.16	4,701.16	45,782.84	90.7%
TOTAL, CLASSIFIED SALARIES			1,945,062.00	1,945,062.00	448,063.71	1,528,735.93	416,326.07	21.4%
EMPLOYEE BENEFITS								
STRS		3101-3102	1,429,762.85	1,429,762.85	146,930.39	1,371,582.56	58,180.29	4.1%
PERS		3201-3202	722,373.35	722,373.35	127,060.87	439,565.34	282,808.01	39.1%
OASDI/Medicare/Alternative		3301-3302	163,534.89	163,534.89	49,447.99	179,901.45	(16,366.56)	-10.0%
Health and Welfare Benefits		3401-3402	625,996.00	625,996.00	147,307.67	542,994.66	83,001.34	13.3%
Unemployment Insurance		3501-3502	5,707.96	5,707.96	710.43	3,925.74	1,782.22	31.2%
Workers' Compensation		3601-3602	37,295.07	37,295.07	16,913.95	55,947.26	(18,652.19)	-50.0%
OPEB, Allocated		3701-3702	0.00	0.00	0.00	0.00	0.00	0.0%
OPEB, Active Employees		3751-3752	22,438.00	22,438.00	10,504.15	40,737.52	(18,299.52)	-81.6%
Other Employee Benefits		3901-3902	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, EMPLOYEE BENEFITS			3,007,108.12	3,007,108.12	498,875.45	2,634,654.53	372,453.59	12.4%
BOOKS AND SUPPLIES								

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Approved Textbooks and Core Curricula Materials		4100	120,789.86	120,789.86	62,681.34	123,289.86	(2,500.00)	-2.1%
Books and Other Reference Materials		4200	0.00	0.00	158.74	158.74	(158.74)	New
Materials and Supplies		4300	4,537,784.02	4,537,784.02	88,057.75	4,022,205.17	515,578.85	11.4%
Noncapitalized Equipment		4400	91,050.89	91,050.89	32,728.65	166,596.16	(75,545.27)	-83.0%
Food		4700	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, BOOKS AND SUPPLIES			4,749,624.77	4,749,624.77	183,626.48	4,312,249.93	437,374.84	9.2%
SERVICES AND OTHER OPERATING EXPENDITURES								
Subagreements for Services		5100	777,435.00	777,435.00	115,597.99	580,572.00	196,863.00	25.3%
Travel and Conferences		5200	31,672.90	31,672.90	23,251.96	47,385.86	(15,712.96)	-49.6%
Dues and Memberships		5300	0.00	0.00	0.00	0.00	0.00	0.0%
Insurance		5400-5450	0.00	0.00	0.00	0.00	0.00	0.0%
Operations and Housekeeping Services		5500	0.00	0.00	270.00	0.00	0.00	0.0%
Rentals, Leases, Repairs, and Noncapitalized Improvements		5600	4,500.00	4,500.00	0.00	4,500.00	0.00	0.0%
Transfers of Direct Costs		5710	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Direct Costs - Interfund		5750	0.00	0.00	0.00	0.00	0.00	0.0%
Professional/Consulting Services and Operating Expenditures		5800	1,174,134.01	1,174,134.01	441,065.15	2,290,019.45	(1,115,885.44)	-95.0%
Communications		5900	13,300.00	13,300.00	278.37	9,100.00	4,200.00	31.6%
TOTAL, SERVICES AND OTHER OPERATING EXPENDITURES			2,001,041.91	2,001,041.91	580,463.47	2,931,577.31	(930,535.40)	-46.5%
CAPITAL OUTLAY								
Land		6100	0.00	0.00	0.00	0.00	0.00	0.0%
Land Improvements		6170	0.00	0.00	0.00	0.00	0.00	0.0%
Buildings and Improvements of Buildings		6200	184,195.00	184,195.00	59,326.15	202,785.00	(18,590.00)	-10.1%
Books and Media for New School Libraries or Major Expansion of School Libraries		6300	0.00	0.00	0.00	0.00	0.00	0.0%
Equipment		6400	112,448.00	112,448.00	54,017.09	112,448.00	0.00	0.0%
Equipment Replacement		6500	1,514,530.60	1,514,530.60	0.00	880,050.02	634,480.58	41.9%
Lease Assets		6600	0.00	0.00	0.00	0.00	0.00	0.0%
Subscription Assets		6700	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CAPITAL OUTLAY			1,811,173.60	1,811,173.60	113,343.24	1,195,283.02	615,890.58	34.0%
OTHER OUTGO (excluding Transfers of Indirect Costs)								
Tuition								
Tuition for Instruction Under Interdistrict								
Attendance Agreements		7110	0.00	0.00	0.00	0.00	0.00	0.0%
State Special Schools		7130	0.00	0.00	0.00	0.00	0.00	0.0%
Tuition, Excess Costs, and/or Deficit Payments								
Payments to Districts or Charter Schools		7141	0.00	0.00	0.00	0.00	0.00	0.0%
Payments to County Offices		7142	0.00	0.00	0.00	0.00	0.00	0.0%
Payments to JPAs		7143	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Pass-Through Revenues								
To Districts or Charter Schools		7211	0.00	0.00	0.00	0.00	0.00	0.0%
To County Offices		7212	0.00	0.00	0.00	0.00	0.00	0.0%
To JPAs		7213	0.00	0.00	0.00	0.00	0.00	0.0%

Revenues, Expenditures, and Changes in Fund Balance

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Special Education SELPA Transfers of Apportionments								
To Districts or Charter Schools	6500	7221	0.00	0.00	0.00	0.00	0.00	0.0%
To County Offices	6500	7222	0.00	0.00	0.00	0.00	0.00	0.0%
To JPAs	6500	7223	0.00	0.00	0.00	0.00	0.00	0.0%
ROC/P Transfers of Apportionments								
To Districts or Charter Schools	6360	7221	0.00	0.00	0.00	0.00	0.00	0.0%
To County Offices	6360	7222	0.00	0.00	0.00	0.00	0.00	0.0%
To JPAs	6360	7223	0.00	0.00	0.00	0.00	0.00	0.0%
Other Transfers of Apportionments	All Other	7221-7223	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers		7281-7283	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers Out to All Others		7299	0.00	0.00	0.00	0.00	0.00	0.0%
Debt Service								
Debt Service - Interest		7438	0.00	0.00	0.00	0.00	0.00	0.0%
Other Debt Service - Principal		7439	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER OUTGO (excluding Transfers of Indirect Costs)			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER OUTGO - TRANSFERS OF INDIRECT COSTS								
Transfers of Indirect Costs		7310	67,228.93	67,228.93	0.00	29,943.93	37,285.00	55.5%
Transfers of Indirect Costs - Interfund		7350	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER OUTGO - TRANSFERS OF INDIRECT COSTS			67,228.93	67,228.93	0.00	29,943.93	37,285.00	55.5%
TOTAL, EXPENDITURES			16,669,587.33	16,669,587.33	2,685,516.46	15,815,622.63	853,964.70	5.1%
INTERFUND TRANSFERS								
INTERFUND TRANSFERS IN								
From: Special Reserve Fund		8912	0.00	0.00	0.00	0.00	0.00	0.0%
From: Bond Interest and Redemption Fund		8914	0.00	0.00	0.00	0.00	0.00	0.0%
Other Authorized Interfund Transfers In		8919	0.00	0.00	0.00	0.00	0.00	0.0%
(a) TOTAL, INTERFUND TRANSFERS IN			0.00	0.00	0.00	0.00	0.00	0.0%
INTERFUND TRANSFERS OUT								
To: Child Development Fund		7611	0.00	0.00	0.00	0.00	0.00	0.0%
To: Special Reserve Fund		7612	0.00	0.00	0.00	0.00	0.00	0.0%
To: State School Building Fund/ County School Facilities Fund		7613	0.00	0.00	0.00	0.00	0.00	0.0%
To: Cafeteria Fund		7616	0.00	0.00	0.00	0.00	0.00	0.0%
Other Authorized Interfund Transfers Out		7619	0.00	0.00	0.00	0.00	0.00	0.0%
(b) TOTAL, INTERFUND TRANSFERS OUT			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER SOURCES/USES								
SOURCES								
State Apportionments								
Emergency Apportionments		8931	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds								
Proceeds from Disposal of Capital Assets		8953	0.00	0.00	0.00	0.00	0.00	0.0%
Other Sources								
Transfers from Funds of Lapsed/Reorganized LEAs		8965	0.00	0.00	0.00	0.00	0.00	0.0%

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Long-Term Debt Proceeds								
Proceeds from Certificates of Participation		8971	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from Leases		8972	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from Lease Revenue Bonds		8973	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from SBITAs		8974	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Sources		8979	0.00	0.00	0.00	0.00	0.00	0.0%
(c) TOTAL, SOURCES			0.00	0.00	0.00	0.00	0.00	0.0%
USES								
Transfers of Funds from Lapsed/Reorganized LEAs		7651	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Uses		7699	0.00	0.00	0.00	0.00	0.00	0.0%
(d) TOTAL, USES			0.00	0.00	0.00	0.00	0.00	0.0%
CONTRIBUTIONS								
Contributions from Unrestricted Revenues		8980	5,205,852.15	5,205,852.15	9,630.00	5,054,413.84	(151,438.31)	-2.9%
Contributions from Restricted Revenues		8990	0.00	0.00	0.00	0.00	0.00	0.0%
(e) TOTAL, CONTRIBUTIONS			5,205,852.15	5,205,852.15	9,630.00	5,054,413.84	(151,438.31)	-2.9%
TOTAL, OTHER FINANCING SOURCES/USES (a - b + c - d + e)			5,205,852.15	5,205,852.15	9,630.00	5,054,413.84	151,438.31	2.9%

2023-24 First Interim
General Fund
Summary - Unrestricted/Restricted
Revenues, Expenditures, and Changes in Fund Balance

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
A. REVENUES								
1) LCFF Sources		8010-8099	24,187,648.00	24,187,648.00	3,317,424.46	24,713,930.00	526,282.00	2.2%
2) Federal Revenue		8100-8299	4,464,003.04	4,464,003.04	606,240.88	4,299,686.93	(164,316.11)	-3.7%
3) Other State Revenue		8300-8599	3,133,114.57	3,133,114.57	1,362,074.49	3,692,002.61	558,888.04	17.8%
4) Other Local Revenue		8600-8799	1,163,272.66	1,163,272.66	589,116.87	1,172,604.32	9,331.66	0.8%
5) TOTAL, REVENUES			32,948,038.27	32,948,038.27	5,874,856.70	33,878,223.86		
B. EXPENDITURES								
1) Certificated Salaries		1000-1999	12,521,429.00	12,521,429.00	3,545,891.29	12,492,649.04	28,779.96	0.2%
2) Classified Salaries		2000-2999	4,950,642.00	4,950,642.00	1,463,531.06	4,915,362.44	35,279.56	0.7%
3) Employee Benefits		3000-3999	7,045,772.48	7,045,772.48	2,015,818.80	7,680,659.87	(634,887.39)	-9.0%
4) Books and Supplies		4000-4999	5,306,366.34	5,306,366.34	306,036.78	4,981,565.22	324,801.12	6.1%
5) Services and Other Operating Expenditures		5000-5999	5,174,719.12	5,174,719.12	1,670,916.94	6,176,133.71	(1,001,414.59)	-19.4%
6) Capital Outlay		6000-6999	1,941,173.60	1,941,173.60	447,570.96	1,632,869.05	308,304.55	15.9%
7) Other Outgo (excluding Transfers of Indirect Costs)		7100-7299 7400-7499	52,000.00	52,000.00	19,432.00	52,000.00	0.00	0.0%
8) Other Outgo - Transfers of Indirect Costs		7300-7399	(17,122.00)	(17,122.00)	0.00	(17,122.00)	0.00	0.0%
9) TOTAL, EXPENDITURES			36,974,980.54	36,974,980.54	9,469,197.83	37,914,117.33		
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B9)			(4,026,942.27)	(4,026,942.27)	(3,594,341.13)	(4,035,893.47)		
D. OTHER FINANCING SOURCES/USES								
1) Interfund Transfers								
a) Transfers In		8900-8929	0.00	0.00	0.00	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.00	0.00	0.00	0.0%
2) Other Sources/Uses								
a) Sources		8930-8979	0.00	0.00	0.00	0.00	0.00	0.0%
b) Uses		7630-7699	0.00	0.00	0.00	0.00	0.00	0.0%
3) Contributions		8980-8999	0.00	0.00	0.00	0.00	0.00	0.0%
4) TOTAL, OTHER FINANCING SOURCES/USES			0.00	0.00	0.00	0.00		
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)			(4,026,942.27)	(4,026,942.27)	(3,594,341.13)	(4,035,893.47)		
F. FUND BALANCE, RESERVES								
1) Beginning Fund Balance								
a) As of July 1 - Unaudited		9791	15,097,972.66	15,097,972.66		15,097,972.66	0.00	0.0%
b) Audit Adjustments		9793	0.00	0.00		0.00	0.00	0.0%
c) As of July 1 - Audited (F1a + F1b)			15,097,972.66	15,097,972.66		15,097,972.66		
d) Other Restatements		9795	0.00	0.00		0.00	0.00	0.0%
e) Adjusted Beginning Balance (F1c + F1d)			15,097,972.66	15,097,972.66		15,097,972.66		
2) Ending Balance, June 30 (E + F1e)			11,071,030.39	11,071,030.39		11,062,079.19		
Components of Ending Fund Balance								
a) Nonspendable								
Revolving Cash		9711	15,000.00	15,000.00		15,000.00		
Stores		9712	0.00	0.00		0.00		
Prepaid Items		9713	0.00	0.00		0.00		

2023-24 First Interim
General Fund
Summary - Unrestricted/Restricted
Revenues, Expenditures, and Changes in Fund Balance

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
All Others		9719	0.00	0.00		0.00		
b) Restricted		9740	2,828,957.04	2,828,957.04		3,513,397.61		
c) Committed								
Stabilization Arrangements		9750	0.00	0.00		0.00		
Other Commitments		9760	0.00	0.00		0.00		
d) Assigned								
Other Assignments		9780	0.00	0.00		0.00		
e) Unassigned/Unappropriated								
Reserve for Economic Uncertainties		9789	1,848,749.00	1,848,749.00		1,895,706.00		
Unassigned/Unappropriated Amount		9790	6,378,324.35	6,378,324.35		5,637,975.58		
LCFF SOURCES								
Principal Apportionment								
State Aid - Current Year		8011	10,883,902.00	10,883,902.00	3,126,160.00	11,363,591.00	479,689.00	4.4%
Education Protection Account State Aid - Current Year		8012	751,335.00	751,335.00	367,170.00	341,720.00	(409,615.00)	-54.5%
State Aid - Prior Years		8019	528,204.00	528,204.00	239,842.00	157,414.00	(370,790.00)	-70.2%
Tax Relief Subventions								
Homeowners' Exemptions		8021	69,314.00	69,314.00	759.86	69,314.00	0.00	0.0%
Timber Yield Tax		8022	0.00	0.00	0.00	0.00	0.00	0.0%
Other Subventions/In-Lieu Taxes		8029	0.00	0.00	0.00	0.00	0.00	0.0%
County & District Taxes								
Secured Roll Taxes		8041	11,712,249.00	11,712,249.00	71,030.84	13,078,851.00	1,366,602.00	11.7%
Unsecured Roll Taxes		8042	909,453.00	909,453.00	10,098.23	997,661.00	88,208.00	9.7%
Prior Years' Taxes		8043	(13,788.00)	(13,788.00)	1,254.53	(10,723.00)	3,065.00	-22.2%
Supplemental Taxes		8044	207,686.00	207,686.00	0.00	225,965.00	18,279.00	8.8%
Education Revenue Augmentation Fund (ERAF)		8045	351,841.00	351,841.00	0.00	508,305.00	156,464.00	44.5%
Community Redevelopment Funds (SB 617/699/1992)		8047	806,787.00	806,787.00	0.00	1,167.00	(805,620.00)	-99.9%
Penalties and Interest from Delinquent Taxes		8048	0.00	0.00	0.00	0.00	0.00	0.0%
Miscellaneous Funds (EC 41604)								
Royalties and Bonuses		8081	0.00	0.00	5,700.00	0.00	0.00	0.0%
Other In-Lieu Taxes		8082	0.00	0.00	0.00	0.00	0.00	0.0%
Less: Non-LCFF								
(50%) Adjustment		8089	0.00	0.00	0.00	0.00	0.00	0.0%
Subtotal, LCFF Sources			26,206,983.00	26,206,983.00	3,822,015.46	26,733,265.00	526,282.00	2.0%
LCFF Transfers								
Unrestricted LCFF								
Transfers - Current Year	0000	8091	0.00	0.00	0.00	0.00	0.00	0.0%
All Other LCFF Transfers - Current Year	All Other	8091	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers to Charter Schools in Lieu of Property Taxes		8096	(2,019,335.00)	(2,019,335.00)	(504,591.00)	(2,019,335.00)	0.00	0.0%
Property Taxes Transfers		8097	0.00	0.00	0.00	0.00	0.00	0.0%
LCFF/Revenue Limit Transfers - Prior Years		8099	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, LCFF SOURCES			24,187,648.00	24,187,648.00	3,317,424.46	24,713,930.00	526,282.00	2.2%
FEDERAL REVENUE								

2023-24 First Interim
General Fund
Summary - Unrestricted/Restricted
Revenues, Expenditures, and Changes in Fund Balance

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Maintenance and Operations		8110	0.00	0.00	0.00	0.00	0.00	0.0%
Special Education Entitlement		8181	340,000.00	340,000.00	0.00	340,000.00	0.00	0.0%
Special Education Discretionary Grants		8182	26,725.00	26,725.00	0.00	86,312.00	59,587.00	223.0%
Child Nutrition Programs		8220	0.00	0.00	61,305.24	61,305.24	61,305.24	New
Donated Food Commodities		8221	0.00	0.00	0.00	0.00	0.00	0.0%
Forest Reserve Funds		8260	0.00	0.00	0.00	0.00	0.00	0.0%
Flood Control Funds		8270	0.00	0.00	0.00	0.00	0.00	0.0%
Wildlife Reserve Funds		8280	0.00	0.00	0.00	0.00	0.00	0.0%
FEMA		8281	0.00	0.00	0.00	0.00	0.00	0.0%
Interagency Contracts Between LEAs		8285	0.00	0.00	0.00	0.00	0.00	0.0%
Pass-Through Revenues from Federal Sources		8287	0.00	0.00	0.00	0.00	0.00	0.0%
Title I, Part A, Basic	3010	8290	663,741.04	663,741.04	25,190.92	663,741.04	0.00	0.0%
Title I, Part D, Local Delinquent Programs	3025	8290	0.00	0.00	0.00	0.00	0.00	0.0%
Title II, Part A, Supporting Effective Instruction	4035	8290	73,839.00	73,839.00	0.00	73,839.00	0.00	0.0%
Title III, Part A, Immigrant Student Program	4201	8290	0.00	0.00	0.00	0.00	0.00	0.0%
Title III, Part A, English Learner Program	4203	8290	58,907.00	58,907.00	3,272.00	62,768.36	3,861.36	6.6%
Public Charter Schools Grant Program (PCSGP)	4610	8290	0.00	0.00	0.00	0.00	0.00	0.0%
Other NCLB / Every Student Succeeds Act	3040, 3060, 3061, 3110, 3150, 3155, 3180, 3182, 4037, 4123, 4124, 4126, 4127, 4128, 5630	8290	0.00	0.00	0.00	0.00	0.00	0.0%
Career and Technical Education	3500-3599	8290	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Federal Revenue	All Other	8290	3,300,791.00	3,300,791.00	516,472.72	3,011,721.29	(289,069.71)	-8.8%
TOTAL, FEDERAL REVENUE			4,464,003.04	4,464,003.04	606,240.88	4,299,686.93	(164,316.11)	-3.7%
OTHER STATE REVENUE								
Other State Apportionments								
ROC/P Entitlement								
Prior Years	6360	8319	0.00	0.00	0.00	0.00	0.00	0.0%
Special Education Master Plan								
Current Year	6500	8311	0.00	0.00	0.00	0.00	0.00	0.0%
Prior Years	6500	8319	0.00	0.00	0.00	0.00	0.00	0.0%
All Other State Apportionments - Current Year	All Other	8311	0.00	0.00	0.00	0.00	0.00	0.0%
All Other State Apportionments - Prior Years	All Other	8319	0.00	0.00	0.00	0.00	0.00	0.0%
Child Nutrition Programs		8520	0.00	0.00	0.00	0.00	0.00	0.0%
Mandated Costs Reimbursements		8550	78,425.00	78,425.00	0.00	78,425.00	0.00	0.0%
Lottery - Unrestricted and Instructional Materials		8560	368,708.00	368,708.00	59,432.82	368,708.00	0.00	0.0%
Tax Relief Subventions								
Restricted Levies - Other								
Homeowners' Exemptions		8575	0.00	0.00	0.00	0.00	0.00	0.0%
Other Subventions/In-Lieu Taxes		8576	0.00	0.00	0.00	0.00	0.00	0.0%

2023-24 First Interim
General Fund
Summary - Unrestricted/Restricted
Revenues, Expenditures, and Changes in Fund Balance

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Pass-Through Revenues from State Sources		8587	0.00	0.00	0.00	0.00	0.00	0.0%
After School Education and Safety (ASES)	6010	8590	457,836.00	457,836.00	25,710.00	457,836.00	0.00	0.0%
Charter School Facility Grant	6030	8590	0.00	0.00	0.00	0.00	0.00	0.0%
Career Technical Education Incentive Grant Program	6387	8590	241,191.00	241,191.00	118,253.59	241,191.00	0.00	0.0%
Drug/Alcohol/Tobacco Funds	6650, 6690, 6695	8590	0.00	0.00	13,406.12	13,406.12	13,406.12	New
California Clean Energy Jobs Act	6230	8590	0.00	0.00	(9,630.00)	(9,630.00)	(9,630.00)	New
Specialized Secondary	7370	8590	0.00	0.00	62,861.77	0.00	0.00	0.0%
American Indian Early Childhood Education	7210	8590	0.00	0.00	0.00	0.00	0.00	0.0%
All Other State Revenue	All Other	8590	1,986,954.57	1,986,954.57	1,092,040.19	2,542,066.49	555,111.92	27.9%
TOTAL, OTHER STATE REVENUE			3,133,114.57	3,133,114.57	1,362,074.49	3,692,002.61	558,888.04	17.8%
OTHER LOCAL REVENUE								
Other Local Revenue								
County and District Taxes								
Other Restricted Levies								
Secured Roll		8615	0.00	0.00	0.00	0.00	0.00	0.0%
Unsecured Roll		8616	0.00	0.00	0.00	0.00	0.00	0.0%
Prior Years' Taxes		8617	0.00	0.00	0.00	0.00	0.00	0.0%
Supplemental Taxes		8618	0.00	0.00	0.00	0.00	0.00	0.0%
Non-Ad Valorem Taxes								
Parcel Taxes		8621	0.00	0.00	0.00	0.00	0.00	0.0%
Other		8622	0.00	0.00	0.00	0.00	0.00	0.0%
Community Redevelopment Funds Not Subject to LCFF Deduction		8625	0.00	0.00	0.00	0.00	0.00	0.0%
Penalties and Interest from Delinquent Non-LCFF Taxes		8629	0.00	0.00	0.00	0.00	0.00	0.0%
Sales								
Sale of Equipment/Supplies		8631	0.00	0.00	0.00	0.00	0.00	0.0%
Sale of Publications		8632	0.00	0.00	0.00	0.00	0.00	0.0%
Food Service Sales		8634	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Sales		8639	0.00	0.00	0.00	0.00	0.00	0.0%
Leases and Rentals		8650	10,400.00	10,400.00	19,353.06	10,400.00	0.00	0.0%
Interest		8660	147,982.00	147,982.00	0.00	147,982.00	0.00	0.0%
Net Increase (Decrease) in the Fair Value of Investments		8662	0.00	0.00	63,296.18	0.00	0.00	0.0%
Fees and Contracts								
Adult Education Fees		8671	0.00	0.00	0.00	0.00	0.00	0.0%
Non-Resident Students		8672	0.00	0.00	0.00	0.00	0.00	0.0%
Transportation Fees From Individuals		8675	0.00	0.00	0.00	0.00	0.00	0.0%
Interagency Services		8677	44,882.46	44,882.46	9,859.00	44,882.46	0.00	0.0%
Mitigation/Developer Fees		8681	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Fees and Contracts		8689	0.00	0.00	0.00	0.00	0.00	0.0%
Other Local Revenue								
Plus: Misc Funds Non-LCFF (50%) Adjustment		8691	0.00	0.00	0.00	0.00	0.00	0.0%
Pass-Through Revenues From Local Sources		8697	0.00	0.00	0.00	0.00	0.00	0.0%

Revenues, Expenditures, and Changes in Fund Balance

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
All Other Local Revenue		8699	426,827.20	426,827.20	105,314.98	436,158.86	9,331.66	2.2%
Tuition		8710	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers In		8781-8783	20,000.00	20,000.00	0.00	20,000.00	0.00	0.0%
Transfers Of Apportionments								
Special Education SELPA Transfers								
From Districts or Charter Schools	6500	8791	0.00	0.00	0.00	0.00	0.00	0.0%
From County Offices	6500	8792	513,181.00	513,181.00	391,293.65	513,181.00	0.00	0.0%
From JPAs	6500	8793	0.00	0.00	0.00	0.00	0.00	0.0%
ROC/P Transfers								
From Districts or Charter Schools	6360	8791	0.00	0.00	0.00	0.00	0.00	0.0%
From County Offices	6360	8792	0.00	0.00	0.00	0.00	0.00	0.0%
From JPAs	6360	8793	0.00	0.00	0.00	0.00	0.00	0.0%
Other Transfers of Apportionments								
From Districts or Charter Schools	All Other	8791	0.00	0.00	0.00	0.00	0.00	0.0%
From County Offices	All Other	8792	0.00	0.00	0.00	0.00	0.00	0.0%
From JPAs	All Other	8793	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers In from All Others		8799	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER LOCAL REVENUE			1,163,272.66	1,163,272.66	589,116.87	1,172,604.32	9,331.66	0.8%
TOTAL, REVENUES			32,948,038.27	32,948,038.27	5,874,856.70	33,878,223.86	930,185.59	2.8%
CERTIFICATED SALARIES								
Certificated Teachers' Salaries		1100	9,522,604.00	9,522,604.00	2,534,309.51	8,968,973.10	553,630.90	5.8%
Certificated Pupil Support Salaries		1200	1,479,999.00	1,479,999.00	485,311.67	1,879,552.84	(399,553.84)	-27.0%
Certificated Supervisors' and Administrators' Salaries		1300	1,518,826.00	1,518,826.00	526,270.11	1,644,123.10	(125,297.10)	-8.2%
Other Certificated Salaries		1900	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CERTIFICATED SALARIES			12,521,429.00	12,521,429.00	3,545,891.29	12,492,649.04	28,779.96	0.2%
CLASSIFIED SALARIES								
Classified Instructional Salaries		2100	1,353,006.00	1,353,006.00	288,293.55	1,045,782.00	307,224.00	22.7%
Classified Support Salaries		2200	1,761,911.00	1,761,911.00	552,133.96	1,989,694.84	(227,783.84)	-12.9%
Classified Supervisors' and Administrators' Salaries		2300	177,326.00	177,326.00	179,265.45	515,469.69	(338,143.69)	-190.7%
Clerical, Technical and Office Salaries		2400	1,440,455.00	1,440,455.00	410,954.73	1,268,469.08	171,985.92	11.9%
Other Classified Salaries		2900	217,944.00	217,944.00	32,883.37	95,946.83	121,997.17	56.0%
TOTAL, CLASSIFIED SALARIES			4,950,642.00	4,950,642.00	1,463,531.06	4,915,362.44	35,279.56	0.7%
EMPLOYEE BENEFITS								
STRS		3101-3102	2,373,680.68	2,373,680.68	626,832.15	3,071,501.18	(697,820.50)	-29.4%
PERS		3201-3202	1,553,231.00	1,553,231.00	407,844.93	1,382,278.02	170,952.98	11.0%
OASDI/Medicare/Alternative		3301-3302	1,000,086.37	1,000,086.37	173,720.42	626,701.43	373,384.94	37.3%
Health and Welfare Benefits		3401-3402	1,760,051.00	1,760,051.00	668,693.26	2,162,077.04	(402,026.04)	-22.8%
Unemployment Insurance		3501-3502	160,063.24	160,063.24	2,966.73	15,794.21	144,269.03	90.1%
Workers' Compensation		3601-3602	119,586.19	119,586.19	68,019.06	240,956.61	(121,370.42)	-101.5%
OPEB, Allocated		3701-3702	0.00	0.00	22,989.98	0.00	0.00	0.0%
OPEB, Active Employees		3751-3752	60,874.00	60,874.00	44,042.71	163,151.38	(102,277.38)	-168.0%
Other Employee Benefits		3901-3902	18,200.00	18,200.00	709.56	18,200.00	0.00	0.0%
TOTAL, EMPLOYEE BENEFITS			7,045,772.48	7,045,772.48	2,015,818.80	7,680,659.87	(634,887.39)	-9.0%
BOOKS AND SUPPLIES								

2023-24 First Interim
General Fund
Summary - Unrestricted/Restricted
Revenues, Expenditures, and Changes in Fund Balance

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Approved Textbooks and Core Curricula Materials		4100	120,789.86	120,789.86	62,097.35	123,289.86	(2,500.00)	-2.1%
Books and Other Reference Materials		4200	0.00	0.00	158.74	158.74	(158.74)	New
Materials and Supplies		4300	5,012,406.59	5,012,406.59	180,674.03	4,604,022.60	408,383.99	8.1%
Noncapitalized Equipment		4400	173,169.89	173,169.89	63,106.66	254,094.02	(80,924.13)	-46.7%
Food		4700	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, BOOKS AND SUPPLIES			5,306,366.34	5,306,366.34	306,036.78	4,981,565.22	324,801.12	6.1%
SERVICES AND OTHER OPERATING EXPENDITURES								
Subagreements for Services		5100	877,435.00	877,435.00	126,648.39	605,572.00	271,863.00	31.0%
Travel and Conferences		5200	195,283.90	195,283.90	44,117.00	216,499.53	(21,215.63)	-10.9%
Dues and Memberships		5300	87,017.52	87,017.52	42,942.35	65,282.52	21,735.00	25.0%
Insurance		5400-5450	168,500.00	168,500.00	81,144.00	168,500.00	0.00	0.0%
Operations and Housekeeping Services		5500	1,169,831.00	1,169,831.00	317,733.74	1,169,831.00	0.00	0.0%
Rentals, Leases, Repairs, and Noncapitalized Improvements		5600	7,885.00	7,885.00	422.44	12,427.00	(4,542.00)	-57.6%
Transfers of Direct Costs		5710	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Direct Costs - Interfund		5750	0.00	0.00	0.00	0.00	0.00	0.0%
Professional/Consulting Services and Operating Expenditures		5800	2,357,326.91	2,357,326.91	990,226.84	3,619,858.87	(1,262,531.96)	-53.6%
Communications		5900	311,439.79	311,439.79	67,682.18	318,162.79	(6,723.00)	-2.2%
TOTAL, SERVICES AND OTHER OPERATING EXPENDITURES			5,174,719.12	5,174,719.12	1,670,916.94	6,176,133.71	(1,001,414.59)	-19.4%
CAPITAL OUTLAY								
Land		6100	0.00	0.00	0.00	0.00	0.00	0.0%
Land Improvements		6170	0.00	0.00	0.00	0.00	0.00	0.0%
Buildings and Improvements of Buildings		6200	184,195.00	184,195.00	59,326.15	202,785.00	(18,590.00)	-10.1%
Books and Media for New School Libraries or Major Expansion of School Libraries		6300	0.00	0.00	0.00	0.00	0.00	0.0%
Equipment		6400	112,448.00	112,448.00	355,621.87	414,052.78	(301,604.78)	-268.2%
Equipment Replacement		6500	1,644,530.60	1,644,530.60	32,622.94	1,016,031.27	628,499.33	38.2%
Lease Assets		6600	0.00	0.00	0.00	0.00	0.00	0.0%
Subscription Assets		6700	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CAPITAL OUTLAY			1,941,173.60	1,941,173.60	447,570.96	1,632,869.05	308,304.55	15.9%
OTHER OUTGO (excluding Transfers of Indirect Costs)								
Tuition								
Tuition for Instruction Under Interdistrict								
Attendance Agreements		7110	0.00	0.00	0.00	0.00	0.00	0.0%
State Special Schools		7130	0.00	0.00	0.00	0.00	0.00	0.0%
Tuition, Excess Costs, and/or Deficit Payments								
Payments to Districts or Charter Schools		7141	0.00	0.00	0.00	0.00	0.00	0.0%
Payments to County Offices		7142	52,000.00	52,000.00	19,432.00	52,000.00	0.00	0.0%
Payments to JPAs		7143	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Pass-Through Revenues								
To Districts or Charter Schools		7211	0.00	0.00	0.00	0.00	0.00	0.0%
To County Offices		7212	0.00	0.00	0.00	0.00	0.00	0.0%
To JPAs		7213	0.00	0.00	0.00	0.00	0.00	0.0%

Revenues, Expenditures, and Changes in Fund Balance

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Special Education SELPA Transfers of Apportionments								
To Districts or Charter Schools	6500	7221	0.00	0.00	0.00	0.00	0.00	0.0%
To County Offices	6500	7222	0.00	0.00	0.00	0.00	0.00	0.0%
To JPAs	6500	7223	0.00	0.00	0.00	0.00	0.00	0.0%
ROC/P Transfers of Apportionments								
To Districts or Charter Schools	6360	7221	0.00	0.00	0.00	0.00	0.00	0.0%
To County Offices	6360	7222	0.00	0.00	0.00	0.00	0.00	0.0%
To JPAs	6360	7223	0.00	0.00	0.00	0.00	0.00	0.0%
Other Transfers of Apportionments	All Other	7221-7223	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers		7281-7283	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers Out to All Others		7299	0.00	0.00	0.00	0.00	0.00	0.0%
Debt Service								
Debt Service - Interest		7438	0.00	0.00	0.00	0.00	0.00	0.0%
Other Debt Service - Principal		7439	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER OUTGO (excluding Transfers of Indirect Costs)			52,000.00	52,000.00	19,432.00	52,000.00	0.00	0.0%
OTHER OUTGO - TRANSFERS OF INDIRECT COSTS								
Transfers of Indirect Costs		7310	0.00	0.00	0.00	0.00		
Transfers of Indirect Costs - Interfund		7350	(17,122.00)	(17,122.00)	0.00	(17,122.00)	0.00	0.0%
TOTAL, OTHER OUTGO - TRANSFERS OF INDIRECT COSTS			(17,122.00)	(17,122.00)	0.00	(17,122.00)	0.00	0.0%
TOTAL, EXPENDITURES			36,974,980.54	36,974,980.54	9,469,197.83	37,914,117.33	(939,136.79)	-2.5%
INTERFUND TRANSFERS								
INTERFUND TRANSFERS IN								
From: Special Reserve Fund		8912	0.00	0.00	0.00	0.00	0.00	0.0%
From: Bond Interest and Redemption Fund		8914	0.00	0.00	0.00	0.00	0.00	0.0%
Other Authorized Interfund Transfers In		8919	0.00	0.00	0.00	0.00	0.00	0.0%
(a) TOTAL, INTERFUND TRANSFERS IN			0.00	0.00	0.00	0.00	0.00	0.0%
INTERFUND TRANSFERS OUT								
To: Child Development Fund		7611	0.00	0.00	0.00	0.00	0.00	0.0%
To: Special Reserve Fund		7612	0.00	0.00	0.00	0.00	0.00	0.0%
To: State School Building Fund/ County School Facilities Fund		7613	0.00	0.00	0.00	0.00	0.00	0.0%
To: Cafeteria Fund		7616	0.00	0.00	0.00	0.00	0.00	0.0%
Other Authorized Interfund Transfers Out		7619	0.00	0.00	0.00	0.00	0.00	0.0%
(b) TOTAL, INTERFUND TRANSFERS OUT			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER SOURCES/USES								
SOURCES								
State Apportionments								
Emergency Apportionments		8931	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds								
Proceeds from Disposal of Capital Assets		8953	0.00	0.00	0.00	0.00	0.00	0.0%
Other Sources								
Transfers from Funds of Lapsed/Reorganized LEAs		8965	0.00	0.00	0.00	0.00	0.00	0.0%

2023-24 First Interim
General Fund
Summary - Unrestricted/Restricted
Revenues, Expenditures, and Changes in Fund Balance

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Long-Term Debt Proceeds								
Proceeds from Certificates of Participation		8971	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from Leases		8972	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from Lease Revenue Bonds		8973	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from SBITAs		8974	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Sources		8979	0.00	0.00	0.00	0.00	0.00	0.0%
(c) TOTAL, SOURCES			0.00	0.00	0.00	0.00	0.00	0.0%
USES								
Transfers of Funds from Lapsed/Reorganized LEAs		7651	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Uses		7699	0.00	0.00	0.00	0.00	0.00	0.0%
(d) TOTAL, USES			0.00	0.00	0.00	0.00	0.00	0.0%
CONTRIBUTIONS								
Contributions from Unrestricted Revenues		8980	0.00	0.00	0.00	0.00		
Contributions from Restricted Revenues		8990	0.00	0.00	0.00	0.00		
(e) TOTAL, CONTRIBUTIONS			0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER FINANCING SOURCES/USES (a - b + c - d + e)			0.00	0.00	0.00	0.00	0.00	0.0%

Resource	Description	2023-24 Projected Totals
2600	Expanded Learning Opportunities Program	891,502.95
3010	ESSA: Title I, Part A, Basic Grants Low-Income and Neglected	212,961.41
3305	Special Ed: ARP IDEA Part B, Sec. 611, Local Assistance Entitlement	59,587.00
6010	After School Education and Safety (ASES)	9.61
6300	Lottery: Instructional Materials	277,351.58
6547	Special Education Early Intervention Preschool Grant	157,682.00
6690	Tobacco-Use Prevention Education: Grades Six Through Twelve	15,406.12
6762	Arts, Music, and Instructional Materials Discretionary Block Grant	508,180.00
7032	Child Nutrition: Kitchen Infrastructure and Training Funds - 2022 KIT Funds	254,056.00
8150	Ongoing & Major Maintenance Account (RMA: Education Code Section 17070.75)	710,337.56
8210	Student Activity Funds	247,405.28
9010	Other Restricted Local	178,918.10
Total, Restricted Balance		3,513,397.61

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
A. REVENUES								
1) LCFF Sources		8010-8099	0.00	0.00	0.00	0.00	0.00	0.0%
2) Federal Revenue		8100-8299	0.00	0.00	0.00	0.00	0.00	0.0%
3) Other State Revenue		8300-8599	97,681.00	97,681.00	17,610.00	97,681.00	0.00	0.0%
4) Other Local Revenue		8600-8799	400.00	400.00	324.16	400.00	0.00	0.0%
5) TOTAL, REVENUES			98,081.00	98,081.00	17,934.16	98,081.00		
B. EXPENDITURES								
1) Certificated Salaries		1000-1999	59,083.00	59,083.00	4,268.08	59,083.00	0.00	0.0%
2) Classified Salaries		2000-2999	20,179.00	20,179.00	5,828.20	21,039.00	(860.00)	-4.3%
3) Employee Benefits		3000-3999	31,469.16	31,469.16	3,991.43	25,071.16	6,398.00	20.3%
4) Books and Supplies		4000-4999	7,826.00	7,826.00	0.00	7,826.00	0.00	0.0%
5) Services and Other Operating Expenditures		5000-5999	16,256.00	16,256.00	6,912.52	37,097.00	(20,841.00)	-128.2%
6) Capital Outlay		6000-6999	0.00	0.00	0.00	0.00	0.00	0.0%
7) Other Outgo (excluding Transfers of Indirect Costs)		7100-7299,7400-7499	0.00	0.00	0.00	0.00	0.00	0.0%
8) Other Outgo - Transfers of Indirect Costs		7300-7399	4,271.00	4,271.00	0.00	4,271.00	0.00	0.0%
9) TOTAL, EXPENDITURES			139,084.16	139,084.16	21,000.23	154,387.16		
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B9)			(41,003.16)	(41,003.16)	(3,066.07)	(56,306.16)		
D. OTHER FINANCING SOURCES/USES								
1) Interfund Transfers								
a) Transfers In		8900-8929	0.00	0.00	0.00	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.00	0.00	0.00	0.0%
2) Other Sources/Uses								
a) Sources		8930-8979	0.00	0.00	0.00	0.00	0.00	0.0%
b) Uses		7630-7699	0.00	0.00	0.00	0.00	0.00	0.0%
3) Contributions		8980-8999	0.00	0.00	0.00	0.00	0.00	0.0%
4) TOTAL, OTHER FINANCING SOURCES/USES			0.00	0.00	0.00	0.00		
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)			(41,003.16)	(41,003.16)	(3,066.07)	(56,306.16)		
F. FUND BALANCE, RESERVES								
1) Beginning Fund Balance								
a) As of July 1 - Unaudited		9791	66,109.88	66,109.88		66,109.88	0.00	0.0%
b) Audit Adjustments		9793	0.00	0.00		0.00	0.00	0.0%
c) As of July 1 - Audited (F1a + F1b)			66,109.88	66,109.88		66,109.88		
d) Other Restatements		9795	0.00	0.00		0.00	0.00	0.0%
e) Adjusted Beginning Balance (F1c + F1d)			66,109.88	66,109.88		66,109.88		
2) Ending Balance, June 30 (E + F1e)			25,106.72	25,106.72		9,803.72		
Components of Ending Fund Balance								
a) Nonspendable								
Revolving Cash		9711	0.00	0.00		0.00		
Stores		9712	0.00	0.00		0.00		
Prepaid Items		9713	0.00	0.00		0.00		
All Others		9719	0.00	0.00		0.00		
b) Restricted		9740	25,106.72	25,106.72		9,803.72		
c) Committed								

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Stabilization Arrangements		9750	0.00	0.00		0.00		
Other Commitments		9760	0.00	0.00		0.00		
d) Assigned								
Other Assignments		9780	0.00	0.00		0.00		
e) Unassigned/Unappropriated								
Reserve for Economic Uncertainties		9789	0.00	0.00		0.00		
Unassigned/Unappropriated Amount		9790	0.00	0.00		0.00		
LCFF SOURCES								
LCFF Transfers								
LCFF Transfers - Current Year		8091	0.00	0.00	0.00	0.00	0.00	0.0%
LCFF/Revenue Limit Transfers - Prior Years		8099	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, LCFF SOURCES			0.00	0.00	0.00	0.00	0.00	0.0%
FEDERAL REVENUE								
Interagency Contracts Between LEAs			0.00	0.00	0.00	0.00	0.00	0.0%
Pass-Through Revenues From Federal Sources			0.00	0.00	0.00	0.00	0.00	0.0%
Career and Technical Education	3500-3599	8290	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Federal Revenue	All Other	8290	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, FEDERAL REVENUE			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER STATE REVENUE								
Other State Apportionments								
All Other State Apportionments - Current Year		8311	0.00	0.00	0.00	0.00	0.00	0.0%
All Other State Apportionments - Prior Years		8319	0.00	0.00	0.00	0.00	0.00	0.0%
Pass-Through Revenues from State Sources			0.00	0.00	0.00	0.00	0.00	0.0%
Adult Education Program	6391	8590	96,816.00	96,816.00	17,610.00	96,816.00	0.00	0.0%
All Other State Revenue	All Other	8590	865.00	865.00	0.00	865.00	0.00	0.0%
TOTAL, OTHER STATE REVENUE			97,681.00	97,681.00	17,610.00	97,681.00	0.00	0.0%
OTHER LOCAL REVENUE								
Sales								
Sale of Equipment/Supplies		8631	0.00	0.00	0.00	0.00	0.00	0.0%
Leases and Rentals			0.00	0.00	0.00	0.00	0.00	0.0%
Interest			400.00	400.00	0.00	400.00	0.00	0.0%
Net Increase (Decrease) in the Fair Value of Investments			0.00	0.00	324.16	0.00	0.00	0.0%
Fees and Contracts								
Adult Education Fees		8671	0.00	0.00	0.00	0.00	0.00	0.0%
Interagency Services			0.00	0.00	0.00	0.00	0.00	0.0%
Other Local Revenue								
All Other Local Revenue		8699	0.00	0.00	0.00	0.00	0.00	0.0%
Tuition			0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER LOCAL REVENUE			400.00	400.00	324.16	400.00	0.00	0.0%
TOTAL, REVENUES			98,081.00	98,081.00	17,934.16	98,081.00		
CERTIFICATED SALARIES								
Certificated Teachers' Salaries			52,000.00	52,000.00	2,200.00	52,000.00	0.00	0.0%
Certificated Pupil Support Salaries			0.00	0.00	0.00	0.00	0.00	0.0%
Certificated Supervisors' and Administrators' Salaries			7,083.00	7,083.00	2,068.08	7,083.00	0.00	0.0%
Other Certificated Salaries			0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CERTIFICATED SALARIES			59,083.00	59,083.00	4,268.08	59,083.00	0.00	0.0%

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
CLASSIFIED SALARIES								
Classified Instructional Salaries		2100	0.00	0.00	0.00	0.00	0.00	0.0%
Classified Support Salaries		2200	0.00	0.00	0.00	0.00	0.00	0.0%
Classified Supervisors' and Administrators' Salaries		2300	0.00	0.00	0.00	0.00	0.00	0.0%
Clerical, Technical and Office Salaries		2400	20,179.00	20,179.00	5,828.20	21,039.00	(860.00)	-4.3%
Other Classified Salaries		2900	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CLASSIFIED SALARIES			20,179.00	20,179.00	5,828.20	21,039.00	(860.00)	-4.3%
EMPLOYEE BENEFITS								
STRS		3101-3102	12,150.00	12,150.00	420.20	10,797.00	1,353.00	11.1%
PERS		3201-3202	5,449.00	5,449.00	2,106.72	7,229.00	(1,780.00)	-32.7%
OASDI/Medicare/Alternative		3301-3302	2,402.00	2,402.00	638.66	2,972.00	(570.00)	-23.7%
Health and Welfare Benefits		3401-3402	9,973.00	9,973.00	612.15	2,543.00	7,430.00	74.5%
Unemployment Insurance		3501-3502	160.00	160.00	5.33	160.00	0.00	0.0%
Workers' Compensation		3601-3602	1,062.16	1,062.16	137.16	1,087.16	(25.00)	-2.4%
OPEB, Allocated		3701-3702	0.00	0.00	0.00	0.00	0.00	0.0%
OPEB, Active Employees		3751-3752	273.00	273.00	71.21	283.00	(10.00)	-3.7%
Other Employee Benefits		3901-3902	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, EMPLOYEE BENEFITS			31,469.16	31,469.16	3,991.43	25,071.16	6,398.00	20.3%
BOOKS AND SUPPLIES								
Approved Textbooks and Core Curricula Materials		4100	2,500.00	2,500.00	0.00	2,500.00	0.00	0.0%
Books and Other Reference Materials		4200	0.00	0.00	0.00	0.00	0.00	0.0%
Materials and Supplies		4300	4,326.00	4,326.00	0.00	4,326.00	0.00	0.0%
Noncapitalized Equipment		4400	1,000.00	1,000.00	0.00	1,000.00	0.00	0.0%
TOTAL, BOOKS AND SUPPLIES			7,826.00	7,826.00	0.00	7,826.00	0.00	0.0%
SERVICES AND OTHER OPERATING EXPENDITURES								
Subagreements for Services		5100	2,939.00	2,939.00	627.88	2,939.00	0.00	0.0%
Travel and Conferences		5200	5,241.00	5,241.00	0.00	5,241.00	0.00	0.0%
Dues and Memberships		5300	0.00	0.00	0.00	0.00	0.00	0.0%
Insurance		5400-5450	0.00	0.00	0.00	0.00	0.00	0.0%
Operations and Housekeeping Services		5500	0.00	0.00	0.00	0.00	0.00	0.0%
Rentals, Leases, Repairs, and Noncapitalized Improvements		5600	5,000.00	5,000.00	0.00	5,000.00	0.00	0.0%
Transfers of Direct Costs		5710	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Direct Costs - Interfund		5750	0.00	0.00	0.00	0.00	0.00	0.0%
Professional/Consulting Services and								
Operating Expenditures		5800	3,076.00	3,076.00	6,284.64	23,917.00	(20,841.00)	-677.5%
Communications		5900	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, SERVICES AND OTHER OPERATING EXPENDITURES			16,256.00	16,256.00	6,912.52	37,097.00	(20,841.00)	-128.2%
CAPITAL OUTLAY								
Land		6100	0.00	0.00	0.00	0.00	0.00	0.0%
Land Improvements		6170	0.00	0.00	0.00	0.00	0.00	0.0%
Buildings and Improvements of Buildings		6200	0.00	0.00	0.00	0.00	0.00	0.0%
Equipment		6400	0.00	0.00	0.00	0.00	0.00	0.0%
Equipment Replacement		6500	0.00	0.00	0.00	0.00	0.00	0.0%
Lease Assets		6600	0.00	0.00	0.00	0.00	0.00	0.0%
Subscription Assets		6700	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CAPITAL OUTLAY			0.00	0.00	0.00	0.00	0.00	0.0%

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
OTHER OUTGO (excluding Transfers of Indirect Costs)								
Tuition								
Tuition, Excess Costs, and/or Deficit Payments								
Payments to Districts or Charter Schools		7141	0.00	0.00	0.00	0.00	0.00	0.0%
Payments to County Offices		7142	0.00	0.00	0.00	0.00	0.00	0.0%
Payments to JPAs		7143	0.00	0.00	0.00	0.00	0.00	0.0%
Other Transfers Out								
Transfers of Pass-Through Revenues								
To Districts or Charter Schools		7211	0.00	0.00	0.00	0.00	0.00	0.0%
To County Offices		7212	0.00	0.00	0.00	0.00	0.00	0.0%
To JPAs		7213	0.00	0.00	0.00	0.00	0.00	0.0%
Debt Service								
Debt Service - Interest		7438	0.00	0.00	0.00	0.00	0.00	0.0%
Other Debt Service - Principal		7439	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER OUTGO (excluding Transfers of Indirect Costs)			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER OUTGO - TRANSFERS OF INDIRECT COSTS								
Transfers of Indirect Costs - Interfund		7350	4,271.00	4,271.00	0.00	4,271.00	0.00	0.0%
TOTAL, OTHER OUTGO - TRANSFERS OF INDIRECT COSTS			4,271.00	4,271.00	0.00	4,271.00	0.00	0.0%
TOTAL, EXPENDITURES			139,084.16	139,084.16	21,000.23	154,387.16		
INTERFUND TRANSFERS								
INTERFUND TRANSFERS IN								
Other Authorized Interfund Transfers In		8919	0.00	0.00	0.00	0.00	0.00	0.0%
(a) TOTAL, INTERFUND TRANSFERS IN			0.00	0.00	0.00	0.00	0.00	0.0%
INTERFUND TRANSFERS OUT								
To: State School Building Fund/County School Facilities Fund		7613	0.00	0.00	0.00	0.00	0.00	0.0%
Other Authorized Interfund Transfers Out		7619	0.00	0.00	0.00	0.00	0.00	0.0%
(b) TOTAL, INTERFUND TRANSFERS OUT			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER SOURCES/USES								
SOURCES								
Other Sources								
Transfers from Funds of Lapsed/Reorganized LEAs		8965	0.00	0.00	0.00	0.00	0.00	0.0%
Long-Term Debt Proceeds								
Proceeds from Certificates of Participation		8971	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from Leases		8972	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from SBITAs		8974	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Sources		8979	0.00	0.00	0.00	0.00	0.00	0.0%
(c) TOTAL, SOURCES			0.00	0.00	0.00	0.00	0.00	0.0%
USES								
Transfers of Funds from Lapsed/Reorganized LEAs		7651	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Uses		7699	0.00	0.00	0.00	0.00	0.00	0.0%
(d) TOTAL, USES			0.00	0.00	0.00	0.00	0.00	0.0%
CONTRIBUTIONS								
Contributions from Unrestricted Revenues		8980	0.00	0.00	0.00	0.00	0.00	0.0%
Contributions from Restricted Revenues		8990	0.00	0.00	0.00	0.00	0.00	0.0%
(e) TOTAL, CONTRIBUTIONS			0.00	0.00	0.00	0.00	0.00	0.0%

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
TOTAL, OTHER FINANCING SOURCES/USES (a - b + c - d + e)			0.00	0.00	0.00	0.00		

Resource	Description	2023-24 Projected Totals
6391	Adult Education Program	9,803.72
Total, Restricted Balance		9,803.72

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
A. REVENUES								
1) LCFF Sources		8010-8099	0.00	0.00	0.00	0.00	0.00	0.0%
2) Federal Revenue		8100-8299	0.00	0.00	0.00	0.00	0.00	0.0%
3) Other State Revenue		8300-8599	477,927.00	477,927.00	281,280.00	477,927.00	0.00	0.0%
4) Other Local Revenue		8600-8799	850.00	850.00	219.78	850.00	0.00	0.0%
5) TOTAL, REVENUES			478,777.00	478,777.00	281,499.78	478,777.00		
B. EXPENDITURES								
1) Certificated Salaries		1000-1999	6,840.00	6,840.00	2,446.78	7,315.00	(475.00)	-6.9%
2) Classified Salaries		2000-2999	227,024.00	227,024.00	69,470.59	279,338.58	(52,314.58)	-23.0%
3) Employee Benefits		3000-3999	130,168.24	130,168.24	38,720.66	128,938.24	1,230.00	0.9%
4) Books and Supplies		4000-4999	100,402.76	100,402.76	1,452.05	46,104.61	54,298.15	54.1%
5) Services and Other Operating Expenditures		5000-5999	1,491.00	1,491.00	758.92	4,009.79	(2,518.79)	-168.9%
6) Capital Outlay		6000-6999	0.00	0.00	0.00	0.00	0.00	0.0%
7) Other Outgo (excluding Transfers of Indirect Costs)		7100-7299,7400-7499	0.00	0.00	0.00	0.00	0.00	0.0%
8) Other Outgo - Transfers of Indirect Costs		7300-7399	12,851.00	12,851.00	0.00	12,851.00	0.00	0.0%
9) TOTAL, EXPENDITURES			478,777.00	478,777.00	112,849.00	478,557.22		
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B9)			0.00	0.00	168,650.78	219.78		
D. OTHER FINANCING SOURCES/USES								
1) Interfund Transfers								
a) Transfers In		8900-8929	0.00	0.00	0.00	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.00	0.00	0.00	0.0%
2) Other Sources/Uses								
a) Sources		8930-8979	0.00	0.00	0.00	0.00	0.00	0.0%
b) Uses		7630-7699	0.00	0.00	0.00	0.00	0.00	0.0%
3) Contributions		8980-8999	0.00	0.00	0.00	0.00	0.00	0.0%
4) TOTAL, OTHER FINANCING SOURCES/USES			0.00	0.00	0.00	0.00		
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)			0.00	0.00	168,650.78	219.78		
F. FUND BALANCE, RESERVES								
1) Beginning Fund Balance								
a) As of July 1 - Unaudited		9791	(219.78)	(219.78)		(219.78)	0.00	0.0%
b) Audit Adjustments		9793	0.00	0.00		0.00	0.00	0.0%
c) As of July 1 - Audited (F1a + F1b)			(219.78)	(219.78)		(219.78)		
d) Other Restatements		9795	0.00	0.00		0.00	0.00	0.0%
e) Adjusted Beginning Balance (F1c + F1d)			(219.78)	(219.78)		(219.78)		
2) Ending Balance, June 30 (E + F1e)			(219.78)	(219.78)		0.00		
Components of Ending Fund Balance								
a) Nonspendable								
Revolving Cash		9711	0.00	0.00		0.00		
Stores		9712	0.00	0.00		0.00		
Prepaid Items		9713	0.00	0.00		0.00		
All Others		9719	0.00	0.00		0.00		
b) Restricted		9740	0.00	0.00		0.00		
c) Committed								

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Stabilization Arrangements		9750	0.00	0.00		0.00		
Other Commitments		9760	0.00	0.00		0.00		
d) Assigned								
Other Assignments		9780	0.00	0.00		0.00		
e) Unassigned/Unappropriated								
Reserve for Economic Uncertainties		9789	0.00	0.00		0.00		
Unassigned/Unappropriated Amount		9790	(219.78)	(219.78)		0.00		
FEDERAL REVENUE								
Child Nutrition Programs		8220	0.00	0.00	0.00	0.00	0.00	0.0%
Interagency Contracts Between LEAs		8285	0.00	0.00	0.00	0.00	0.00	0.0%
Title I, Part A, Basic	3010	8290	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Federal Revenue	All Other	8290	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, FEDERAL REVENUE			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER STATE REVENUE								
Child Nutrition Programs		8520	0.00	0.00	0.00	0.00	0.00	0.0%
Child Development Apportionments		8530	0.00	0.00	0.00	0.00	0.00	0.0%
Pass-Through Revenues from State Sources		8587	0.00	0.00	0.00	0.00	0.00	0.0%
State Preschool	6105	8590	476,197.00	476,197.00	281,280.00	476,197.00	0.00	0.0%
All Other State Revenue	All Other	8590	1,730.00	1,730.00	0.00	1,730.00	0.00	0.0%
TOTAL, OTHER STATE REVENUE			477,927.00	477,927.00	281,280.00	477,927.00	0.00	0.0%
OTHER LOCAL REVENUE								
Sales								
Sale of Equipment/Supplies		8631	0.00	0.00	0.00	0.00	0.00	0.0%
Food Service Sales		8634	0.00	0.00	0.00	0.00	0.00	0.0%
Interest		8660	500.00	500.00	0.00	500.00	0.00	0.0%
Net Increase (Decrease) in the Fair Value of Investments		8662	0.00	0.00	219.78	0.00	0.00	0.0%
Fees and Contracts								
Child Development Parent Fees		8673	0.00	0.00	0.00	0.00	0.00	0.0%
Interagency Services		8677	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Fees and Contracts		8689	0.00	0.00	0.00	0.00	0.00	0.0%
Other Local Revenue								
All Other Local Revenue		8699	350.00	350.00	0.00	350.00	0.00	0.0%
All Other Transfers In from All Others		8799	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER LOCAL REVENUE			850.00	850.00	219.78	850.00	0.00	0.0%
TOTAL, REVENUES			478,777.00	478,777.00	281,499.78	478,777.00		
CERTIFICATED SALARIES								
Certificated Teachers' Salaries		1100	0.00	0.00	0.00	0.00	0.00	0.0%
Certificated Pupil Support Salaries		1200	0.00	0.00	0.00	0.00	0.00	0.0%
Certificated Supervisors' and Administrators' Salaries		1300	6,840.00	6,840.00	2,446.78	7,315.00	(475.00)	-6.9%
Other Certificated Salaries		1900	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CERTIFICATED SALARIES			6,840.00	6,840.00	2,446.78	7,315.00	(475.00)	-6.9%
CLASSIFIED SALARIES								
Classified Instructional Salaries		2100	198,917.00	198,917.00	60,131.35	251,231.58	(52,314.58)	-26.3%
Classified Support Salaries		2200	4,957.00	4,957.00	1,652.16	4,957.00	0.00	0.0%
Classified Supervisors' and Administrators' Salaries		2300	0.00	0.00	0.00	0.00	0.00	0.0%
Clerical, Technical and Office Salaries		2400	23,150.00	23,150.00	7,687.08	23,150.00	0.00	0.0%

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Other Classified Salaries		2900	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CLASSIFIED SALARIES			227,024.00	227,024.00	69,470.59	279,338.58	(52,314.58)	-23.0%
EMPLOYEE BENEFITS								
STRS		3101-3102	3,037.00	3,037.00	3,670.22	13,097.00	(10,060.00)	-331.2%
PERS		3201-3202	62,298.00	62,298.00	13,285.13	43,298.00	19,000.00	30.5%
OASDI/Medicare/Alternative		3301-3302	17,471.75	17,471.75	4,324.46	15,631.75	1,840.00	10.5%
Health and Welfare Benefits		3401-3402	42,125.00	42,125.00	15,816.26	51,540.00	(9,415.00)	-22.4%
Unemployment Insurance		3501-3502	470.00	470.00	43.76	270.00	200.00	42.6%
Workers' Compensation		3601-3602	3,080.49	3,080.49	974.95	3,010.49	70.00	2.3%
OPEB, Allocated		3701-3702	0.00	0.00	0.00	0.00	0.00	0.0%
OPEB, Active Employees		3751-3752	1,686.00	1,686.00	605.88	2,091.00	(405.00)	-24.0%
Other Employee Benefits		3901-3902	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, EMPLOYEE BENEFITS			130,168.24	130,168.24	38,720.66	128,938.24	1,230.00	0.9%
BOOKS AND SUPPLIES								
Approved Textbooks and Core Curricula Materials		4100	0.00	0.00	0.00	0.00	0.00	0.0%
Books and Other Reference Materials		4200	0.00	0.00	0.00	0.00	0.00	0.0%
Materials and Supplies		4300	100,402.76	100,402.76	1,452.05	44,104.61	56,298.15	56.1%
Noncapitalized Equipment		4400	0.00	0.00	0.00	2,000.00	(2,000.00)	New
Food		4700	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, BOOKS AND SUPPLIES			100,402.76	100,402.76	1,452.05	46,104.61	54,298.15	54.1%
SERVICES AND OTHER OPERATING EXPENDITURES								
Subagreements for Services		5100	0.00	0.00	0.00	0.00	0.00	0.0%
Travel and Conferences		5200	0.00	0.00	0.00	0.00	0.00	0.0%
Dues and Memberships		5300	0.00	0.00	0.00	0.00	0.00	0.0%
Insurance		5400-5450	0.00	0.00	0.00	0.00	0.00	0.0%
Operations and Housekeeping Services		5500	0.00	0.00	0.00	0.00	0.00	0.0%
Rentals, Leases, Repairs, and Noncapitalized Improvements		5600	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Direct Costs		5710	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Direct Costs - Interfund		5750	0.00	0.00	0.00	0.00	0.00	0.0%
Professional/Consulting Services and Operating Expenditures		5800	1,462.00	1,462.00	758.92	3,980.79	(2,518.79)	-172.3%
Communications		5900	29.00	29.00	0.00	29.00	0.00	0.0%
TOTAL, SERVICES AND OTHER OPERATING EXPENDITURES			1,491.00	1,491.00	758.92	4,009.79	(2,518.79)	-168.9%
CAPITAL OUTLAY								
Land		6100	0.00	0.00	0.00	0.00	0.00	0.0%
Land Improvements		6170	0.00	0.00	0.00	0.00	0.00	0.0%
Buildings and Improvements of Buildings		6200	0.00	0.00	0.00	0.00	0.00	0.0%
Equipment		6400	0.00	0.00	0.00	0.00	0.00	0.0%
Equipment Replacement		6500	0.00	0.00	0.00	0.00	0.00	0.0%
Lease Assets		6600	0.00	0.00	0.00	0.00	0.00	0.0%
Subscription Assets		6700	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CAPITAL OUTLAY			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER OUTGO (excluding Transfers of Indirect Costs)								
Other Transfers Out								
All Other Transfers Out to All Others		7299	0.00	0.00	0.00	0.00	0.00	0.0%
Debt Service								

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Debt Service - Interest		7438	0.00	0.00	0.00	0.00	0.00	0.0%
Other Debt Service - Principal		7439	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER OUTGO (excluding Transfers of Indirect Costs)			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER OUTGO - TRANSFERS OF INDIRECT COSTS								
Transfers of Indirect Costs - Interfund		7350	12,851.00	12,851.00	0.00	12,851.00	0.00	0.0%
TOTAL, OTHER OUTGO - TRANSFERS OF INDIRECT COSTS			12,851.00	12,851.00	0.00	12,851.00	0.00	0.0%
TOTAL, EXPENDITURES			478,777.00	478,777.00	112,849.00	478,557.22		
INTERFUND TRANSFERS								
INTERFUND TRANSFERS IN								
From: General Fund		8911	0.00	0.00	0.00	0.00	0.00	0.0%
Other Authorized Interfund Transfers In		8919	0.00	0.00	0.00	0.00	0.00	0.0%
(a) TOTAL, INTERFUND TRANSFERS IN			0.00	0.00	0.00	0.00	0.00	0.0%
INTERFUND TRANSFERS OUT								
Other Authorized Interfund Transfers Out		7619	0.00	0.00	0.00	0.00	0.00	0.0%
(b) TOTAL, INTERFUND TRANSFERS OUT			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER SOURCES/USES								
SOURCES								
Other Sources								
Transfers from Funds of Lapsed/Reorganized LEAs		8965	0.00	0.00	0.00	0.00	0.00	0.0%
Long-Term Debt Proceeds								
Proceeds from Certificates of Participation		8971	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from Leases		8972	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from SBITAs		8974	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Sources		8979	0.00	0.00	0.00	0.00	0.00	0.0%
(c) TOTAL, SOURCES			0.00	0.00	0.00	0.00	0.00	0.0%
USES								
Transfers of Funds from Lapsed/Reorganized LEAs		7651	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Uses		7699	0.00	0.00	0.00	0.00	0.00	0.0%
(d) TOTAL, USES			0.00	0.00	0.00	0.00	0.00	0.0%
CONTRIBUTIONS								
Contributions from Unrestricted Revenues		8980	0.00	0.00	0.00	0.00	0.00	0.0%
Contributions from Restricted Revenues		8990	0.00	0.00	0.00	0.00	0.00	0.0%
(e) TOTAL, CONTRIBUTIONS			0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER FINANCING SOURCES/USES (a - b + c - d + e)			0.00	0.00	0.00	0.00		

Resource	Description	2023-24 Projected Totals
Total, Restricted Balance		0.00

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
A. REVENUES								
1) LCFF Sources		8010-8099	0.00	0.00	0.00	0.00	0.00	0.0%
2) Federal Revenue		8100-8299	979,116.00	979,116.00	28,654.24	979,116.00	0.00	0.0%
3) Other State Revenue		8300-8599	508,083.28	508,083.28	5,063.65	506,083.28	(2,000.00)	-0.4%
4) Other Local Revenue		8600-8799	1,348.75	1,348.75	933.16	1,348.75	0.00	0.0%
5) TOTAL, REVENUES			1,488,548.03	1,488,548.03	34,651.05	1,486,548.03		
B. EXPENDITURES								
1) Certificated Salaries		1000-1999	0.00	0.00	0.00	0.00	0.00	0.0%
2) Classified Salaries		2000-2999	440,205.00	440,205.00	128,379.31	471,224.63	(31,019.63)	-7.0%
3) Employee Benefits		3000-3999	257,765.00	257,765.00	58,687.68	208,228.09	49,536.91	19.2%
4) Books and Supplies		4000-4999	18,627.03	18,627.03	1,759.86	18,627.03	0.00	0.0%
5) Services and Other Operating Expenditures		5000-5999	675,200.00	675,200.00	72,716.47	714,176.16	(38,976.16)	-5.8%
6) Capital Outlay		6000-6999	0.00	0.00	0.00	0.00	0.00	0.0%
7) Other Outgo (excluding Transfers of Indirect Costs)		7100-7299,7400-7499	0.00	0.00	0.00	0.00	0.00	0.0%
8) Other Outgo - Transfers of Indirect Costs		7300-7399	0.00	0.00	0.00	0.00	0.00	0.0%
9) TOTAL, EXPENDITURES			1,391,797.03	1,391,797.03	261,543.32	1,412,255.91		
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B9)			96,751.00	96,751.00	(226,892.27)	74,292.12		
D. OTHER FINANCING SOURCES/USES								
1) Interfund Transfers								
a) Transfers In		8900-8929	0.00	0.00	0.00	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.00	0.00	0.00	0.0%
2) Other Sources/Uses								
a) Sources		8930-8979	0.00	0.00	0.00	0.00	0.00	0.0%
b) Uses		7630-7699	0.00	0.00	0.00	0.00	0.00	0.0%
3) Contributions		8980-8999	0.00	0.00	0.00	0.00	0.00	0.0%
4) TOTAL, OTHER FINANCING SOURCES/USES			0.00	0.00	0.00	0.00		
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)			96,751.00	96,751.00	(226,892.27)	74,292.12		
F. FUND BALANCE, RESERVES								
1) Beginning Fund Balance								
a) As of July 1 - Unaudited		9791	559,929.39	559,929.39		559,929.39	0.00	0.0%
b) Audit Adjustments		9793	0.00	0.00		0.00	0.00	0.0%
c) As of July 1 - Audited (F1a + F1b)			559,929.39	559,929.39		559,929.39		
d) Other Restatements		9795	0.00	0.00		0.00	0.00	0.0%
e) Adjusted Beginning Balance (F1c + F1d)			559,929.39	559,929.39		559,929.39		
2) Ending Balance, June 30 (E + F1e)			656,680.39	656,680.39		634,221.51		
Components of Ending Fund Balance								
a) Nonspendable								
Revolving Cash		9711	0.00	0.00		0.00		
Stores		9712	0.00	0.00		0.00		
Prepaid Items		9713	0.00	0.00		0.00		
All Others		9719	0.00	0.00		0.00		
b) Restricted		9740	656,680.39	656,680.39		634,221.51		
c) Committed								

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Stabilization Arrangements		9750	0.00	0.00		0.00		
Other Commitments		9760	0.00	0.00		0.00		
d) Assigned								
Other Assignments		9780	0.00	0.00		0.00		
e) Unassigned/Unappropriated								
Reserve for Economic Uncertainties		9789	0.00	0.00		0.00		
Unassigned/Unappropriated Amount		9790	0.00	0.00		0.00		
FEDERAL REVENUE								
Child Nutrition Programs		8220	944,116.00	944,116.00	20,866.93	944,116.00	0.00	0.0%
Donated Food Commodities		8221	35,000.00	35,000.00	7,787.31	35,000.00	0.00	0.0%
All Other Federal Revenue		8290	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, FEDERAL REVENUE			979,116.00	979,116.00	28,654.24	979,116.00	0.00	0.0%
OTHER STATE REVENUE								
Child Nutrition Programs		8520	508,083.28	508,083.28	5,063.65	506,083.28	(2,000.00)	-0.4%
All Other State Revenue		8590	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER STATE REVENUE			508,083.28	508,083.28	5,063.65	506,083.28	(2,000.00)	-0.4%
OTHER LOCAL REVENUE								
Sales								
Sale of Equipment/Supplies		8631	0.00	0.00	0.00	0.00	0.00	0.0%
Food Service Sales		8634	403.75	403.75	(25.00)	403.75	0.00	0.0%
Leases and Rentals		8650	0.00	0.00	0.00	0.00	0.00	0.0%
Interest		8660	700.00	700.00	0.00	700.00	0.00	0.0%
Net Increase (Decrease) in the Fair Value of Investments		8662	0.00	0.00	958.16	0.00	0.00	0.0%
Fees and Contracts								
Interagency Services		8677	0.00	0.00	0.00	0.00	0.00	0.0%
Other Local Revenue								
All Other Local Revenue		8699	245.00	245.00	0.00	245.00	0.00	0.0%
TOTAL, OTHER LOCAL REVENUE			1,348.75	1,348.75	933.16	1,348.75	0.00	0.0%
TOTAL, REVENUES			1,488,548.03	1,488,548.03	34,651.05	1,486,548.03		
CERTIFICATED SALARIES								
Certificated Supervisors' and Administrators' Salaries		1300	0.00	0.00	0.00	0.00	0.00	0.0%
Other Certificated Salaries		1900	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CERTIFICATED SALARIES			0.00	0.00	0.00	0.00	0.00	0.0%
CLASSIFIED SALARIES								
Classified Support Salaries		2200	330,598.00	330,598.00	105,210.70	400,317.63	(69,719.63)	-21.1%
Classified Supervisors' and Administrators' Salaries		2300	109,607.00	109,607.00	23,168.61	70,907.00	38,700.00	35.3%
Clerical, Technical and Office Salaries		2400	0.00	0.00	0.00	0.00	0.00	0.0%
Other Classified Salaries		2900	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CLASSIFIED SALARIES			440,205.00	440,205.00	128,379.31	471,224.63	(31,019.63)	-7.0%
EMPLOYEE BENEFITS								
STRS		3101-3102	0.00	0.00	0.00	0.00	0.00	0.0%
PERS		3201-3202	103,638.00	103,638.00	33,322.77	113,427.07	(9,789.07)	-9.4%
OASDI/Medicare/Alternative		3301-3302	29,388.00	29,388.00	9,392.77	35,505.17	(6,117.17)	-20.8%
Health and Welfare Benefits		3401-3402	115,101.00	115,101.00	12,935.70	48,101.00	67,000.00	58.2%
Unemployment Insurance		3501-3502	783.00	783.00	70.61	489.50	293.50	37.5%

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Workers' Compensation		3601-3602	5,003.00	5,003.00	1,721.88	5,903.35	(900.35)	-18.0%
OPEB, Allocated		3701-3702	0.00	0.00	0.00	0.00	0.00	0.0%
OPEB, Active Employees		3751-3752	3,852.00	3,852.00	1,243.95	4,802.00	(950.00)	-24.7%
Other Employee Benefits		3901-3902	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, EMPLOYEE BENEFITS			257,765.00	257,765.00	58,687.68	208,228.09	49,536.91	19.2%
BOOKS AND SUPPLIES								
Books and Other Reference Materials		4200	0.00	0.00	0.00	0.00	0.00	0.0%
Materials and Supplies		4300	14,400.00	14,400.00	721.74	14,400.00	0.00	0.0%
Noncapitalized Equipment		4400	4,227.03	4,227.03	1,038.12	4,227.03	0.00	0.0%
Food		4700	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, BOOKS AND SUPPLIES			18,627.03	18,627.03	1,759.86	18,627.03	0.00	0.0%
SERVICES AND OTHER OPERATING EXPENDITURES								
Subagreements for Services		5100	0.00	0.00	1,246.16	1,246.16	(1,246.16)	New
Travel and Conferences		5200	700.00	700.00	727.65	3,200.00	(2,500.00)	-357.1%
Dues and Memberships		5300	0.00	0.00	0.00	0.00	0.00	0.0%
Insurance		5400-5450	0.00	0.00	0.00	0.00	0.00	0.0%
Operations and Housekeeping Services		5500	6,700.00	6,700.00	232.35	6,900.00	(200.00)	-3.0%
Rentals, Leases, Repairs, and Noncapitalized Improvements		5600	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Direct Costs		5710	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Direct Costs - Interfund		5750	0.00	0.00	0.00	0.00	0.00	0.0%
Professional/Consulting Services and								
Operating Expenditures		5800	667,800.00	667,800.00	70,510.31	702,830.00	(35,030.00)	-5.2%
Communications		5900	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, SERVICES AND OTHER OPERATING EXPENDITURES			675,200.00	675,200.00	72,716.47	714,176.16	(38,976.16)	-5.8%
CAPITAL OUTLAY								
Buildings and Improvements of Buildings		6200	0.00	0.00	0.00	0.00	0.00	0.0%
Equipment		6400	0.00	0.00	0.00	0.00	0.00	0.0%
Equipment Replacement		6500	0.00	0.00	0.00	0.00	0.00	0.0%
Lease Assets		6600	0.00	0.00	0.00	0.00	0.00	0.0%
Subscription Assets		6700	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CAPITAL OUTLAY			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER OUTGO (excluding Transfers of Indirect Costs)								
Debt Service								
Debt Service - Interest		7438	0.00	0.00	0.00	0.00	0.00	0.0%
Other Debt Service - Principal		7439	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER OUTGO (excluding Transfers of Indirect Costs)			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER OUTGO - TRANSFERS OF INDIRECT COSTS								
Transfers of Indirect Costs - Interfund		7350	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER OUTGO - TRANSFERS OF INDIRECT COSTS			0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, EXPENDITURES			1,391,797.03	1,391,797.03	261,543.32	1,412,255.91		
INTERFUND TRANSFERS								
INTERFUND TRANSFERS IN								

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
From: General Fund		8916	0.00	0.00	0.00	0.00	0.00	0.0%
Other Authorized Interfund Transfers In		8919	0.00	0.00	0.00	0.00	0.00	0.0%
(a) TOTAL, INTERFUND TRANSFERS IN			0.00	0.00	0.00	0.00	0.00	0.0%
INTERFUND TRANSFERS OUT								
Other Authorized Interfund Transfers Out		7619	0.00	0.00	0.00	0.00	0.00	0.0%
(b) TOTAL, INTERFUND TRANSFERS OUT			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER SOURCES/USES								
SOURCES								
Other Sources								
Transfers from Funds of Lapsed/Reorganized LEAs		8965	0.00	0.00	0.00	0.00	0.00	0.0%
Long-Term Debt Proceeds								
Proceeds from Leases		8972	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from SBITAs		8974	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Sources		8979	0.00	0.00	0.00	0.00	0.00	0.0%
(c) TOTAL, SOURCES			0.00	0.00	0.00	0.00	0.00	0.0%
USES								
Transfers of Funds from Lapsed/Reorganized LEAs		7651	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Uses		7699	0.00	0.00	0.00	0.00	0.00	0.0%
(d) TOTAL, USES			0.00	0.00	0.00	0.00	0.00	0.0%
CONTRIBUTIONS								
Contributions from Unrestricted Revenues		8980	0.00	0.00	0.00	0.00	0.00	0.0%
Contributions from Restricted Revenues		8990	0.00	0.00	0.00	0.00	0.00	0.0%
(e) TOTAL, CONTRIBUTIONS			0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER FINANCING SOURCES/USES								
(a - b + c - d + e)			0.00	0.00	0.00	0.00		

Resource	Description	2023-24 Projected Totals
5310	Child Nutrition: School Programs (e.g., School Lunch, School Breakfast, Milk, Pregnant & Lactating Students)	470,125.58
5320	Child Nutrition: Child Care Food Program (CCFP) Claims-Centers and Family Day Care Homes (Meal Reimbursements)	150,465.01
7029	Child Nutrition: Food Service Staff Training Funds	13,630.92
Total, Restricted Balance		634,221.51

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
A. REVENUES								
1) LCFF Sources		8010-8099	0.00	0.00	0.00	0.00	0.00	0.0%
2) Federal Revenue		8100-8299	0.00	0.00	0.00	0.00	0.00	0.0%
3) Other State Revenue		8300-8599	0.00	0.00	0.00	0.00	0.00	0.0%
4) Other Local Revenue		8600-8799	400.00	400.00	160.89	400.00	0.00	0.0%
5) TOTAL, REVENUES			400.00	400.00	160.89	400.00		
B. EXPENDITURES								
1) Certificated Salaries		1000-1999	0.00	0.00	0.00	0.00	0.00	0.0%
2) Classified Salaries		2000-2999	0.00	0.00	0.00	0.00	0.00	0.0%
3) Employee Benefits		3000-3999	0.00	0.00	0.00	0.00	0.00	0.0%
4) Books and Supplies		4000-4999	0.00	0.00	0.00	0.00	0.00	0.0%
5) Services and Other Operating Expenditures		5000-5999	0.00	0.00	0.00	0.00	0.00	0.0%
6) Capital Outlay		6000-6999	0.00	0.00	0.00	0.00	0.00	0.0%
7) Other Outgo (excluding Transfers of Indirect Costs)		7100-7299,7400-7499	0.00	0.00	0.00	0.00	0.00	0.0%
8) Other Outgo - Transfers of Indirect Costs		7300-7399	0.00	0.00	0.00	0.00	0.00	0.0%
9) TOTAL, EXPENDITURES			0.00	0.00	0.00	0.00		
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B9)			400.00	400.00	160.89	400.00		
D. OTHER FINANCING SOURCES/USES								
1) Interfund Transfers								
a) Transfers In		8900-8929	0.00	0.00	0.00	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.00	0.00	0.00	0.0%
2) Other Sources/Uses								
a) Sources		8930-8979	0.00	0.00	0.00	0.00	0.00	0.0%
b) Uses		7630-7699	0.00	0.00	0.00	0.00	0.00	0.0%
3) Contributions		8980-8999	0.00	0.00	0.00	0.00	0.00	0.0%
4) TOTAL, OTHER FINANCING SOURCES/USES			0.00	0.00	0.00	0.00		
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)			400.00	400.00	160.89	400.00		
F. FUND BALANCE, RESERVES								
1) Beginning Fund Balance								
a) As of July 1 - Unaudited		9791	42,015.75	42,015.75		42,015.75	0.00	0.0%
b) Audit Adjustments		9793	0.00	0.00		0.00	0.00	0.0%
c) As of July 1 - Audited (F1a + F1b)			42,015.75	42,015.75		42,015.75		
d) Other Restatements		9795	0.00	0.00		0.00	0.00	0.0%
e) Adjusted Beginning Balance (F1c + F1d)			42,015.75	42,015.75		42,015.75		
2) Ending Balance, June 30 (E + F1e)			42,415.75	42,415.75		42,415.75		
Components of Ending Fund Balance								
a) Nonspendable								
Revolving Cash		9711	0.00	0.00		0.00		
Stores		9712	0.00	0.00		0.00		
Prepaid Items		9713	0.00	0.00		0.00		
All Others		9719	0.00	0.00		0.00		
b) Restricted								
		9740	0.00	0.00		0.00		
c) Committed								

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Stabilization Arrangements		9750	0.00	0.00		0.00		
Other Commitments		9760	0.00	0.00		0.00		
d) Assigned								
Other Assignments		9780	42,415.75	42,415.75		42,415.75		
e) Unassigned/Unappropriated								
Reserve for Economic Uncertainties		9789	0.00	0.00		0.00		
Unassigned/Unappropriated Amount		9790	0.00	0.00		0.00		
OTHER LOCAL REVENUE								
Sales								
Sale of Equipment/Supplies		8631	0.00	0.00	0.00	0.00	0.00	0.0%
Interest		8660	400.00	400.00	0.00	400.00	0.00	0.0%
Net Increase (Decrease) in the Fair Value of Investments		8662	0.00	0.00	160.89	0.00	0.00	0.0%
TOTAL, OTHER LOCAL REVENUE			400.00	400.00	160.89	400.00	0.00	0.0%
TOTAL, REVENUES			400.00	400.00	160.89	400.00		
INTERFUND TRANSFERS								
INTERFUND TRANSFERS IN								
From: General Fund/CSSF		8912	0.00	0.00	0.00	0.00	0.00	0.0%
Other Authorized Interfund Transfers In		8919	0.00	0.00	0.00	0.00	0.00	0.0%
(a) TOTAL, INTERFUND TRANSFERS IN			0.00	0.00	0.00	0.00	0.00	0.0%
INTERFUND TRANSFERS OUT								
To: General Fund/CSSF		7612	0.00	0.00	0.00	0.00	0.00	0.0%
To: State School Building Fund/County School Facilities Fund		7613	0.00	0.00	0.00	0.00	0.00	0.0%
Other Authorized Interfund Transfers Out		7619	0.00	0.00	0.00	0.00	0.00	0.0%
(b) TOTAL, INTERFUND TRANSFERS OUT			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER SOURCES/USES								
SOURCES								
Other Sources								
Transfers from Funds of Lapsed/Reorganized LEAs		8965	0.00	0.00	0.00	0.00	0.00	0.0%
(c) TOTAL, SOURCES			0.00	0.00	0.00	0.00	0.00	0.0%
USES								
Transfers of Funds from Lapsed/Reorganized LEAs		7651	0.00	0.00	0.00	0.00	0.00	0.0%
(d) TOTAL, USES			0.00	0.00	0.00	0.00	0.00	0.0%
CONTRIBUTIONS								
Contributions from Restricted Revenues		8990	0.00	0.00	0.00	0.00	0.00	0.0%
(e) TOTAL, CONTRIBUTIONS			0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER FINANCING SOURCES/USES (a - b + c - d + e)			0.00	0.00	0.00	0.00		

Resource	Description	2023-24 Projected Totals
Total, Restricted Balance		0.00

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
A. REVENUES								
1) LCFF Sources		8010-8099	0.00	0.00	0.00	0.00	0.00	0.0%
2) Federal Revenue		8100-8299	0.00	0.00	0.00	0.00	0.00	0.0%
3) Other State Revenue		8300-8599	0.00	0.00	0.00	0.00	0.00	0.0%
4) Other Local Revenue		8600-8799	34,665.00	34,665.00	597.98	34,665.00	0.00	0.0%
5) TOTAL, REVENUES			34,665.00	34,665.00	597.98	34,665.00		
B. EXPENDITURES								
1) Certificated Salaries		1000-1999	0.00	0.00	0.00	0.00	0.00	0.0%
2) Classified Salaries		2000-2999	0.00	0.00	0.00	0.00	0.00	0.0%
3) Employee Benefits		3000-3999	0.00	0.00	0.00	0.00	0.00	0.0%
4) Books and Supplies		4000-4999	0.00	0.00	500.00	662.19	(662.19)	New
5) Services and Other Operating Expenditures		5000-5999	3,172,020.02	3,172,020.02	380,981.37	377,965.50	2,794,054.52	88.1%
6) Capital Outlay		6000-6999	14,793,060.98	14,793,060.98	2,912,766.46	15,095,130.23	(302,069.25)	-2.0%
7) Other Outgo (excluding Transfers of Indirect Costs)		7100-7299,7400-7499	0.00	0.00	0.00	0.00	0.00	0.0%
8) Other Outgo - Transfers of Indirect Costs		7300-7399	0.00	0.00	0.00	0.00	0.00	0.0%
9) TOTAL, EXPENDITURES			17,965,081.00	17,965,081.00	3,294,247.83	15,473,757.92		
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B9)			(17,930,416.00)	(17,930,416.00)	(3,293,649.85)	(15,439,092.92)		
D. OTHER FINANCING SOURCES/USES								
1) Interfund Transfers								
a) Transfers In		8900-8929	0.00	0.00	0.00	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.00	0.00	0.00	0.0%
2) Other Sources/Uses								
a) Sources		8930-8979	17,965,081.00	17,965,081.00	11,010,093.50	17,965,081.00	0.00	0.0%
b) Uses		7630-7699	0.00	0.00	0.00	0.00	0.00	0.0%
3) Contributions		8980-8999	0.00	0.00	0.00	0.00	0.00	0.0%
4) TOTAL, OTHER FINANCING SOURCES/USES			17,965,081.00	17,965,081.00	11,010,093.50	17,965,081.00		
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)			34,665.00	34,665.00	7,716,443.65	2,525,988.08		
F. FUND BALANCE, RESERVES								
1) Beginning Fund Balance								
a) As of July 1 - Unaudited		9791	19,062,470.63	19,062,470.63		19,062,470.63	0.00	0.0%
b) Audit Adjustments		9793	0.00	0.00		0.00	0.00	0.0%
c) As of July 1 - Audited (F1a + F1b)			19,062,470.63	19,062,470.63		19,062,470.63		
d) Other Restatements		9795	0.00	0.00		0.00	0.00	0.0%
e) Adjusted Beginning Balance (F1c + F1d)			19,062,470.63	19,062,470.63		19,062,470.63		
2) Ending Balance, June 30 (E + F1e)			19,097,135.63	19,097,135.63		21,588,458.71		
Components of Ending Fund Balance								
a) Nonspendable								
Revolving Cash		9711	0.00	0.00		0.00		
Stores		9712	0.00	0.00		0.00		

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Prepaid Items		9713	0.00	0.00		0.00		
All Others		9719	0.00	0.00		0.00		
b) Legally Restricted Balance		9740	18,927,007.08	18,927,007.08		21,418,330.16		
c) Committed								
Stabilization Arrangements		9750	0.00	0.00		0.00		
Other Commitments		9760	0.00	0.00		0.00		
d) Assigned								
Other Assignments		9780	170,128.55	170,128.55		170,128.55		
e) Unassigned/Unappropriated								
Reserve for Economic Uncertainties		9789	0.00	0.00		0.00		
Unassigned/Unappropriated Amount		9790	0.00	0.00		0.00		
FEDERAL REVENUE								
FEMA		8281	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Federal Revenue		8290	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, FEDERAL REVENUE			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER STATE REVENUE								
Tax Relief Subventions								
Restricted Levies - Other								
Homeowners' Exemptions		8575	0.00	0.00	0.00	0.00	0.00	0.0%
Other Subventions/In-Lieu Taxes		8576	0.00	0.00	0.00	0.00	0.00	0.0%
All Other State Revenue		8590	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER STATE REVENUE			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER LOCAL REVENUE								
County and District Taxes								
Other Restricted Levies								
Secured Roll		8615	0.00	0.00	0.00	0.00	0.00	0.0%
Unsecured Roll		8616	0.00	0.00	0.00	0.00	0.00	0.0%
Prior Years' Taxes		8617	0.00	0.00	0.00	0.00	0.00	0.0%
Supplemental Taxes		8618	0.00	0.00	0.00	0.00	0.00	0.0%
Non-Ad Valorem Taxes								
Parcel Taxes		8621	0.00	0.00	0.00	0.00	0.00	0.0%
Other		8622	0.00	0.00	0.00	0.00	0.00	0.0%
Community Redevelopment Funds Not Subject to LCFF Deduction		8625	0.00	0.00	0.00	0.00	0.00	0.0%
Penalties and Interest from Delinquent Non-LCFF Taxes		8629	0.00	0.00	0.00	0.00	0.00	0.0%
Sales								
Sale of Equipment/Supplies		8631	0.00	0.00	0.00	0.00	0.00	0.0%
Leases and Rentals		8650	34,356.00	34,356.00	0.00	34,356.00	0.00	0.0%
Interest		8660	309.00	309.00	0.00	309.00	0.00	0.0%
Net Increase (Decrease) in the Fair Value of Investments		8662	0.00	0.00	597.98	0.00	0.00	0.0%
Other Local Revenue								
All Other Local Revenue		8699	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers In from All Others		8799	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER LOCAL REVENUE			34,665.00	34,665.00	597.98	34,665.00	0.00	0.0%
TOTAL, REVENUES			34,665.00	34,665.00	597.98	34,665.00		

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
CLASSIFIED SALARIES								
Classified Support Salaries		2200	0.00	0.00	0.00	0.00	0.00	0.0%
Classified Supervisors' and Administrators' Salaries		2300	0.00	0.00	0.00	0.00	0.00	0.0%
Clerical, Technical and Office Salaries		2400	0.00	0.00	0.00	0.00	0.00	0.0%
Other Classified Salaries		2900	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CLASSIFIED SALARIES			0.00	0.00	0.00	0.00	0.00	0.0%
EMPLOYEE BENEFITS								
STRS		3101-3102	0.00	0.00	0.00	0.00	0.00	0.0%
PERS		3201-3202	0.00	0.00	0.00	0.00	0.00	0.0%
OASDI/Medicare/Alternative		3301-3302	0.00	0.00	0.00	0.00	0.00	0.0%
Health and Welfare Benefits		3401-3402	0.00	0.00	0.00	0.00	0.00	0.0%
Unemployment Insurance		3501-3502	0.00	0.00	0.00	0.00	0.00	0.0%
Workers' Compensation		3601-3602	0.00	0.00	0.00	0.00	0.00	0.0%
OPEB, Allocated		3701-3702	0.00	0.00	0.00	0.00	0.00	0.0%
OPEB, Active Employees		3751-3752	0.00	0.00	0.00	0.00	0.00	0.0%
Other Employee Benefits		3901-3902	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, EMPLOYEE BENEFITS			0.00	0.00	0.00	0.00	0.00	0.0%
BOOKS AND SUPPLIES								
Books and Other Reference Materials		4200	0.00	0.00	0.00	0.00	0.00	0.0%
Materials and Supplies		4300	0.00	0.00	0.00	162.19	(162.19)	New
Noncapitalized Equipment		4400	0.00	0.00	500.00	500.00	(500.00)	New
TOTAL, BOOKS AND SUPPLIES			0.00	0.00	500.00	662.19	(662.19)	New
SERVICES AND OTHER OPERATING EXPENDITURES								
Subagreements for Services		5100	0.00	0.00	0.00	0.00	0.00	0.0%
Travel and Conferences		5200	0.00	0.00	135.20	135.20	(135.20)	New
Insurance		5400-5450	0.00	0.00	22,200.00	0.00	0.00	0.0%
Operations and Housekeeping Services		5500	0.00	0.00	0.00	0.00	0.00	0.0%
Rentals, Leases, Repairs, and Noncapitalized Improvements		5600	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Direct Costs		5710	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Direct Costs - Interfund		5750	0.00	0.00	0.00	0.00	0.00	0.0%
Professional/Consulting Services and Operating Expenditures		5800	3,172,020.02	3,172,020.02	358,646.17	377,830.30	2,794,189.72	88.1%
Communications		5900	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, SERVICES AND OTHER OPERATING EXPENDITURES			3,172,020.02	3,172,020.02	380,981.37	377,965.50	2,794,054.52	88.1%
CAPITAL OUTLAY								
Land		6100	43,340.00	43,340.00	16,745.00	29,550.00	13,790.00	31.8%
Land Improvements		6170	441,850.00	441,850.00	1,346,855.97	1,738,493.40	(1,296,643.40)	-293.5%
Buildings and Improvements of Buildings		6200	14,307,870.98	14,307,870.98	1,460,804.68	13,233,377.11	1,074,493.87	7.5%
Books and Media for New School Libraries or Major Expansion of School Libraries		6300	0.00	0.00	0.00	0.00	0.00	0.0%
Equipment		6400	0.00	0.00	5,819.60	6,558.67	(6,558.67)	New
Equipment Replacement		6500	0.00	0.00	82,541.21	87,151.05	(87,151.05)	New
Lease Assets		6600	0.00	0.00	0.00	0.00	0.00	0.0%
Subscription Assets		6700	0.00	0.00	0.00	0.00	0.00	0.0%

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
TOTAL, CAPITAL OUTLAY			14,793,060.98	14,793,060.98	2,912,766.46	15,095,130.23	(302,069.25)	-2.0%
OTHER OUTGO (excluding Transfers of Indirect Costs)								
Other Transfers Out								
All Other Transfers Out to All Others		7299	0.00	0.00	0.00	0.00	0.00	0.0%
Debt Service								
Repayment of State School Building Fund Aid - Proceeds from Bonds		7435	0.00	0.00	0.00	0.00	0.00	0.0%
Debt Service - Interest		7438	0.00	0.00	0.00	0.00	0.00	0.0%
Other Debt Service - Principal		7439	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER OUTGO (excluding Transfers of Indirect Costs)			0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, EXPENDITURES			17,965,081.00	17,965,081.00	3,294,247.83	15,473,757.92		
INTERFUND TRANSFERS								
INTERFUND TRANSFERS IN								
Other Authorized Interfund Transfers In		8919	0.00	0.00	0.00	0.00	0.00	0.0%
(a) TOTAL, INTERFUND TRANSFERS IN			0.00	0.00	0.00	0.00	0.00	0.0%
INTERFUND TRANSFERS OUT								
To: State School Building Fund/County School Facilities Fund		7613	0.00	0.00	0.00	0.00	0.00	0.0%
Other Authorized Interfund Transfers Out		7619	0.00	0.00	0.00	0.00	0.00	0.0%
(b) TOTAL, INTERFUND TRANSFERS OUT			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER SOURCES/USES								
SOURCES								
Proceeds								
Proceeds from Sale of Bonds		8951	17,965,081.00	17,965,081.00	10,900,000.00	17,965,081.00	0.00	0.0%
Proceeds from Sale/Lease-Purchase of Land/Buildings		8953	0.00	0.00	0.00	0.00	0.00	0.0%
Other Sources								
County School Building Aid		8961	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers from Funds of Lapsed/Reorganized LEAs		8965	0.00	0.00	0.00	0.00	0.00	0.0%
Long-Term Debt Proceeds								
Proceeds from Certificates of Participation		8971	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from Leases		8972	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from Lease Revenue Bonds		8973	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from SBITAs		8974	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Sources		8979	0.00	0.00	110,093.50	0.00	0.00	0.0%
(c) TOTAL, SOURCES			17,965,081.00	17,965,081.00	11,010,093.50	17,965,081.00	0.00	0.0%
USES								
Transfers of Funds from Lapsed/Reorganized LEAs		7651	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Uses		7699	0.00	0.00	0.00	0.00	0.00	0.0%
(d) TOTAL, USES			0.00	0.00	0.00	0.00	0.00	0.0%
CONTRIBUTIONS								

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Contributions from Unrestricted Revenues		8980	0.00	0.00	0.00	0.00	0.00	0.0%
Contributions from Restricted Revenues		8990	0.00	0.00	0.00	0.00	0.00	0.0%
(e) TOTAL, CONTRIBUTIONS			0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER FINANCING SOURCES/USES								
(a - b + c - d + e)			17,965,081.00	17,965,081.00	11,010,093.50	17,965,081.00		

Resource	Description	2023-24 Projected Totals
9010	Other Restricted Local	21,418,330.16
Total, Restricted Balance		21,418,330.16

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
A. REVENUES								
1) LCFF Sources		8010-8099	0.00	0.00	0.00	0.00	0.00	0.0%
2) Federal Revenue		8100-8299	0.00	0.00	0.00	0.00	0.00	0.0%
3) Other State Revenue		8300-8599	0.00	0.00	0.00	0.00	0.00	0.0%
4) Other Local Revenue		8600-8799	123,784.81	123,784.81	28,909.65	123,784.81	0.00	0.0%
5) TOTAL, REVENUES			123,784.81	123,784.81	28,909.65	123,784.81		
B. EXPENDITURES								
1) Certificated Salaries		1000-1999	0.00	0.00	0.00	0.00	0.00	0.0%
2) Classified Salaries		2000-2999	0.00	0.00	0.00	0.00	0.00	0.0%
3) Employee Benefits		3000-3999	0.00	0.00	0.00	0.00	0.00	0.0%
4) Books and Supplies		4000-4999	114.00	114.00	0.00	114.00	0.00	0.0%
5) Services and Other Operating Expenditures		5000-5999	78,284.81	78,284.81	8,104.85	78,284.81	0.00	0.0%
6) Capital Outlay		6000-6999	43,000.00	43,000.00	0.00	43,000.00	0.00	0.0%
7) Other Outgo (excluding Transfers of Indirect Costs)		7100-7299,7400-7499	0.00	0.00	0.00	0.00	0.00	0.0%
8) Other Outgo - Transfers of Indirect Costs		7300-7399	0.00	0.00	0.00	0.00	0.00	0.0%
9) TOTAL, EXPENDITURES			121,398.81	121,398.81	8,104.85	121,398.81		
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B9)			2,386.00	2,386.00	20,804.80	2,386.00		
D. OTHER FINANCING SOURCES/USES								
1) Interfund Transfers								
a) Transfers In		8900-8929	0.00	0.00	0.00	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.00	0.00	0.00	0.0%
2) Other Sources/Uses								
a) Sources		8930-8979	0.00	0.00	0.00	0.00	0.00	0.0%
b) Uses		7630-7699	0.00	0.00	0.00	0.00	0.00	0.0%
3) Contributions		8980-8999	0.00	0.00	0.00	0.00	0.00	0.0%
4) TOTAL, OTHER FINANCING SOURCES/USES			0.00	0.00	0.00	0.00		
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)			2,386.00	2,386.00	20,804.80	2,386.00		
F. FUND BALANCE, RESERVES								
1) Beginning Fund Balance								
a) As of July 1 - Unaudited		9791	1,173,383.29	1,173,383.29		1,173,383.29	0.00	0.0%
b) Audit Adjustments		9793	0.00	0.00		0.00	0.00	0.0%
c) As of July 1 - Audited (F1a + F1b)			1,173,383.29	1,173,383.29		1,173,383.29		
d) Other Restatements		9795	0.00	0.00		0.00	0.00	0.0%
e) Adjusted Beginning Balance (F1c + F1d)			1,173,383.29	1,173,383.29		1,173,383.29		
2) Ending Balance, June 30 (E + F1e)			1,175,769.29	1,175,769.29		1,175,769.29		
Components of Ending Fund Balance								
a) Nonspendable								
Revolving Cash		9711	0.00	0.00		0.00		
Stores		9712	0.00	0.00		0.00		
Prepaid Items		9713	0.00	0.00		0.00		
All Others		9719	0.00	0.00		0.00		
b) Legally Restricted Balance		9740	1,175,769.29	1,175,769.29		1,175,769.29		
c) Committed								

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Stabilization Arrangements		9750	0.00	0.00		0.00		
Other Commitments		9760	0.00	0.00		0.00		
d) Assigned								
Other Assignments		9780	0.00	0.00		0.00		
e) Unassigned/Unappropriated								
Reserve for Economic Uncertainties		9789	0.00	0.00		0.00		
Unassigned/Unappropriated Amount		9790	0.00	0.00		0.00		
OTHER STATE REVENUE								
Tax Relief Subventions								
Restricted Levies - Other								
Homeowners' Exemptions		8575	0.00	0.00	0.00	0.00	0.00	0.0%
Other Subventions/In-Lieu Taxes		8576	0.00	0.00	0.00	0.00	0.00	0.0%
All Other State Revenue		8590	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER STATE REVENUE			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER LOCAL REVENUE								
County and District Taxes								
Other Restricted Levies								
Secured Roll		8615	0.00	0.00	0.00	0.00	0.00	0.0%
Unsecured Roll		8616	0.00	0.00	0.00	0.00	0.00	0.0%
Prior Years' Taxes		8617	0.00	0.00	0.00	0.00	0.00	0.0%
Supplemental Taxes		8618	0.00	0.00	0.00	0.00	0.00	0.0%
Non-Ad Valorem Taxes								
Parcel Taxes		8621	0.00	0.00	0.00	0.00	0.00	0.0%
Other		8622	0.00	0.00	0.00	0.00	0.00	0.0%
Community Redevelopment Funds Not Subject to LCFF Deduction		8625	35,000.00	35,000.00	0.00	35,000.00	0.00	0.0%
Penalties and Interest from Delinquent Non-LCFF Taxes		8629	0.00	0.00	0.00	0.00	0.00	0.0%
Sales								
Sale of Equipment/Supplies		8631	0.00	0.00	0.00	0.00	0.00	0.0%
Interest		8660	15,784.81	15,784.81	0.00	15,784.81	0.00	0.0%
Net Increase (Decrease) in the Fair Value of Investments		8662	0.00	0.00	9,742.59	0.00	0.00	0.0%
Fees and Contracts								
Mitigation/Developer Fees		8681	73,000.00	73,000.00	19,167.06	73,000.00	0.00	0.0%
Other Local Revenue								
All Other Local Revenue		8699	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers In from All Others		8799	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER LOCAL REVENUE			123,784.81	123,784.81	28,909.65	123,784.81	0.00	0.0%
TOTAL, REVENUES			123,784.81	123,784.81	28,909.65	123,784.81		
CERTIFICATED SALARIES								
Other Certificated Salaries		1900	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CERTIFICATED SALARIES			0.00	0.00	0.00	0.00	0.00	0.0%
CLASSIFIED SALARIES								
Classified Support Salaries		2200	0.00	0.00	0.00	0.00	0.00	0.0%
Classified Supervisors' and Administrators' Salaries		2300	0.00	0.00	0.00	0.00	0.00	0.0%
Clerical, Technical and Office Salaries		2400	0.00	0.00	0.00	0.00	0.00	0.0%
Other Classified Salaries		2900	0.00	0.00	0.00	0.00	0.00	0.0%

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
TOTAL, CLASSIFIED SALARIES			0.00	0.00	0.00	0.00	0.00	0.0%
EMPLOYEE BENEFITS								
STRS		3101-3102	0.00	0.00	0.00	0.00	0.00	0.0%
PERS		3201-3202	0.00	0.00	0.00	0.00	0.00	0.0%
OASDI/Medicare/Alternative		3301-3302	0.00	0.00	0.00	0.00	0.00	0.0%
Health and Welfare Benefits		3401-3402	0.00	0.00	0.00	0.00	0.00	0.0%
Unemployment Insurance		3501-3502	0.00	0.00	0.00	0.00	0.00	0.0%
Workers' Compensation		3601-3602	0.00	0.00	0.00	0.00	0.00	0.0%
OPEB, Allocated		3701-3702	0.00	0.00	0.00	0.00	0.00	0.0%
OPEB, Active Employees		3751-3752	0.00	0.00	0.00	0.00	0.00	0.0%
Other Employee Benefits		3901-3902	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, EMPLOYEE BENEFITS			0.00	0.00	0.00	0.00	0.00	0.0%
BOOKS AND SUPPLIES								
Approved Textbooks and Core Curricula Materials		4100	0.00	0.00	0.00	0.00	0.00	0.0%
Books and Other Reference Materials		4200	0.00	0.00	0.00	0.00	0.00	0.0%
Materials and Supplies		4300	114.00	114.00	0.00	114.00	0.00	0.0%
Noncapitalized Equipment		4400	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, BOOKS AND SUPPLIES			114.00	114.00	0.00	114.00	0.00	0.0%
SERVICES AND OTHER OPERATING EXPENDITURES								
Subagreements for Services		5100	0.00	0.00	0.00	0.00	0.00	0.0%
Travel and Conferences		5200	0.00	0.00	0.00	0.00	0.00	0.0%
Insurance		5400-5450	0.00	0.00	0.00	0.00	0.00	0.0%
Operations and Housekeeping Services		5500	0.00	0.00	0.00	0.00	0.00	0.0%
Rentals, Leases, Repairs, and Noncapitalized Improvements		5600	68,284.81	68,284.81	8,104.85	68,284.81	0.00	0.0%
Transfers of Direct Costs		5710	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Direct Costs - Interfund		5750	0.00	0.00	0.00	0.00	0.00	0.0%
Professional/Consulting Services and Operating Expenditures		5800	10,000.00	10,000.00	0.00	10,000.00	0.00	0.0%
Communications		5900	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, SERVICES AND OTHER OPERATING EXPENDITURES			78,284.81	78,284.81	8,104.85	78,284.81	0.00	0.0%
CAPITAL OUTLAY								
Land		6100	0.00	0.00	0.00	0.00	0.00	0.0%
Land Improvements		6170	40,000.00	40,000.00	0.00	40,000.00	0.00	0.0%
Buildings and Improvements of Buildings		6200	3,000.00	3,000.00	0.00	3,000.00	0.00	0.0%
Books and Media for New School Libraries or Major Expansion of School Libraries		6300	0.00	0.00	0.00	0.00	0.00	0.0%
Equipment		6400	0.00	0.00	0.00	0.00	0.00	0.0%
Equipment Replacement		6500	0.00	0.00	0.00	0.00	0.00	0.0%
Lease Assets		6600	0.00	0.00	0.00	0.00	0.00	0.0%
Subscription Assets		6700	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CAPITAL OUTLAY			43,000.00	43,000.00	0.00	43,000.00	0.00	0.0%
OTHER OUTGO (excluding Transfers of Indirect Costs)								
Other Transfers Out								
All Other Transfers Out to All Others			7299	0.00	0.00	0.00	0.00	0.0%
Debt Service								

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Debt Service - Interest		7438	0.00	0.00	0.00	0.00	0.00	0.0%
Other Debt Service - Principal		7439	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER OUTGO (excluding Transfers of Indirect Costs)			0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, EXPENDITURES			121,398.81	121,398.81	8,104.85	121,398.81		
INTERFUND TRANSFERS								
INTERFUND TRANSFERS IN								
Other Authorized Interfund Transfers In		8919	0.00	0.00	0.00	0.00	0.00	0.0%
(a) TOTAL, INTERFUND TRANSFERS IN			0.00	0.00	0.00	0.00	0.00	0.0%
INTERFUND TRANSFERS OUT								
To: State School Building Fund/County School Facilities Fund		7613	0.00	0.00	0.00	0.00	0.00	0.0%
Other Authorized Interfund Transfers Out		7619	0.00	0.00	0.00	0.00	0.00	0.0%
(b) TOTAL, INTERFUND TRANSFERS OUT			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER SOURCES/USES								
SOURCES								
Proceeds								
Proceeds from Sale/Lease-Purchase of Land/Buildings		8953	0.00	0.00	0.00	0.00	0.00	0.0%
Other Sources								
Transfers from Funds of Lapsed/Reorganized LEAs		8965	0.00	0.00	0.00	0.00	0.00	0.0%
Long-Term Debt Proceeds								
Proceeds from Certificates of Participation		8971	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from Leases		8972	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from Lease Revenue Bonds		8973	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from SBITAs		8974	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Sources		8979	0.00	0.00	0.00	0.00	0.00	0.0%
(c) TOTAL, SOURCES			0.00	0.00	0.00	0.00	0.00	0.0%
USES								
Transfers of Funds from Lapsed/Reorganized LEAs		7651	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Uses		7699	0.00	0.00	0.00	0.00	0.00	0.0%
(d) TOTAL, USES			0.00	0.00	0.00	0.00	0.00	0.0%
CONTRIBUTIONS								
Contributions from Unrestricted Revenues		8980	0.00	0.00	0.00	0.00	0.00	0.0%
Contributions from Restricted Revenues		8990	0.00	0.00	0.00	0.00	0.00	0.0%
(e) TOTAL, CONTRIBUTIONS			0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER FINANCING SOURCES/USES								
(a - b + c - d + e)			0.00	0.00	0.00	0.00		

Resource	Description	2023-24 Projected Totals
9010	Other Restricted Local	1,175,769.29
Total, Restricted Balance		1,175,769.29

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
A. REVENUES								
1) LCFF Sources		8010-8099	0.00	0.00	0.00	0.00	0.00	0.0%
2) Federal Revenue		8100-8299	0.00	0.00	0.00	0.00	0.00	0.0%
3) Other State Revenue		8300-8599	0.00	0.00	0.00	0.00	0.00	0.0%
4) Other Local Revenue		8600-8799	30.00	30.00	0.00	30.00	0.00	0.0%
5) TOTAL, REVENUES			30.00	30.00	0.00	30.00		
B. EXPENDITURES								
1) Certificated Salaries		1000-1999	0.00	0.00	0.00	0.00	0.00	0.0%
2) Classified Salaries		2000-2999	0.00	0.00	0.00	0.00	0.00	0.0%
3) Employee Benefits		3000-3999	0.00	0.00	0.00	0.00	0.00	0.0%
4) Books and Supplies		4000-4999	0.00	0.00	0.00	0.00	0.00	0.0%
5) Services and Other Operating Expenditures		5000-5999	0.00	0.00	0.00	0.00	0.00	0.0%
6) Capital Outlay		6000-6999	0.00	0.00	0.00	0.00	0.00	0.0%
7) Other Outgo (excluding Transfers of Indirect Costs)		7100-7299, 7400-7499	0.00	0.00	0.00	0.00	0.00	0.0%
8) Other Outgo - Transfers of Indirect Costs		7300-7399	0.00	0.00	0.00	0.00	0.00	0.0%
9) TOTAL, EXPENDITURES			0.00	0.00	0.00	0.00		
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B9)			30.00	30.00	0.00	30.00		
D. OTHER FINANCING SOURCES/USES								
1) Interfund Transfers								
a) Transfers In		8900-8929	0.00	0.00	0.00	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.00	0.00	0.00	0.0%
2) Other Sources/Uses								
a) Sources		8930-8979	0.00	0.00	0.00	0.00	0.00	0.0%
b) Uses		7630-7699	0.00	0.00	0.00	0.00	0.00	0.0%
3) Contributions		8980-8999	0.00	0.00	0.00	0.00	0.00	0.0%
4) TOTAL, OTHER FINANCING SOURCES/USES			0.00	0.00	0.00	0.00		
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)			30.00	30.00	0.00	30.00		
F. FUND BALANCE, RESERVES								
1) Beginning Fund Balance								
a) As of July 1 - Unaudited		9791	3,523.00	3,523.00		3,523.00	0.00	0.0%
b) Audit Adjustments		9793	0.00	0.00		0.00	0.00	0.0%
c) As of July 1 - Audited (F1a + F1b)			3,523.00	3,523.00		3,523.00		
d) Other Restatements		9795	0.00	0.00		0.00	0.00	0.0%
e) Adjusted Beginning Balance (F1c + F1d)			3,523.00	3,523.00		3,523.00		
2) Ending Balance, June 30 (E + F1e)			3,553.00	3,553.00		3,553.00		
Components of Ending Fund Balance								
a) Nonspendable								
Revolving Cash		9711	0.00	0.00		0.00		
Stores		9712	0.00	0.00		0.00		
Prepaid Items		9713	0.00	0.00		0.00		
All Others		9719	0.00	0.00		0.00		
b) Legally Restricted Balance		9740	3,553.00	3,553.00		3,553.00		
c) Committed								

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Stabilization Arrangements		9750	0.00	0.00		0.00		
Other Commitments		9760	0.00	0.00		0.00		
d) Assigned								
Other Assignments		9780	0.00	0.00		0.00		
e) Unassigned/Unappropriated								
Reserve for Economic Uncertainties		9789	0.00	0.00		0.00		
Unassigned/Unappropriated Amount		9790	0.00	0.00		0.00		
FEDERAL REVENUE								
All Other Federal Revenue		8290	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, FEDERAL REVENUE			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER STATE REVENUE								
School Facilities Apportionments		8545	0.00	0.00	0.00	0.00	0.00	0.0%
Pass-Through Revenues from State Sources		8587	0.00	0.00	0.00	0.00	0.00	0.0%
All Other State Revenue		8590	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER STATE REVENUE			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER LOCAL REVENUE								
Sales								
Sale of Equipment/Supplies		8631	0.00	0.00	0.00	0.00	0.00	0.0%
Leases and Rentals		8650	0.00	0.00	0.00	0.00	0.00	0.0%
Interest		8660	30.00	30.00	0.00	30.00	0.00	0.0%
Net Increase (Decrease) in the Fair Value of Investments		8662	0.00	0.00	0.00	0.00	0.00	0.0%
Other Local Revenue								
All Other Local Revenue		8699	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers In from All Others		8799	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER LOCAL REVENUE			30.00	30.00	0.00	30.00	0.00	0.0%
TOTAL, REVENUES			30.00	30.00	0.00	30.00		
CLASSIFIED SALARIES								
Classified Support Salaries		2200	0.00	0.00	0.00	0.00	0.00	0.0%
Classified Supervisors' and Administrators' Salaries		2300	0.00	0.00	0.00	0.00	0.00	0.0%
Clerical, Technical and Office Salaries		2400	0.00	0.00	0.00	0.00	0.00	0.0%
Other Classified Salaries		2900	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CLASSIFIED SALARIES			0.00	0.00	0.00	0.00	0.00	0.0%
EMPLOYEE BENEFITS								
STRS		3101-3102	0.00	0.00	0.00	0.00	0.00	0.0%
PERS		3201-3202	0.00	0.00	0.00	0.00	0.00	0.0%
OASDI/Medicare/Alternative		3301-3302	0.00	0.00	0.00	0.00	0.00	0.0%
Health and Welfare Benefits		3401-3402	0.00	0.00	0.00	0.00	0.00	0.0%
Unemployment Insurance		3501-3502	0.00	0.00	0.00	0.00	0.00	0.0%
Workers' Compensation		3601-3602	0.00	0.00	0.00	0.00	0.00	0.0%
OPEB, Allocated		3701-3702	0.00	0.00	0.00	0.00	0.00	0.0%
OPEB, Active Employees		3751-3752	0.00	0.00	0.00	0.00	0.00	0.0%
Other Employee Benefits		3901-3902	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, EMPLOYEE BENEFITS			0.00	0.00	0.00	0.00	0.00	0.0%
BOOKS AND SUPPLIES								
Books and Other Reference Materials		4200	0.00	0.00	0.00	0.00	0.00	0.0%
Materials and Supplies		4300	0.00	0.00	0.00	0.00	0.00	0.0%

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Noncapitalized Equipment		4400	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, BOOKS AND SUPPLIES			0.00	0.00	0.00	0.00	0.00	0.0%
SERVICES AND OTHER OPERATING EXPENDITURES								
Subagreements for Services		5100	0.00	0.00	0.00	0.00	0.00	0.0%
Travel and Conferences		5200	0.00	0.00	0.00	0.00	0.00	0.0%
Insurance		5400-5450	0.00	0.00	0.00	0.00	0.00	0.0%
Operations and Housekeeping Services		5500	0.00	0.00	0.00	0.00	0.00	0.0%
Rentals, Leases, Repairs, and Noncapitalized Improvements		5600	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Direct Costs		5710	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Direct Costs - Interfund		5750	0.00	0.00	0.00	0.00	0.00	0.0%
Professional/Consulting Services and Operating Expenditures		5800	0.00	0.00	0.00	0.00	0.00	0.0%
Communications		5900	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, SERVICES AND OTHER OPERATING EXPENDITURES			0.00	0.00	0.00	0.00	0.00	0.0%
CAPITAL OUTLAY								
Land		6100	0.00	0.00	0.00	0.00	0.00	0.0%
Land Improvements		6170	0.00	0.00	0.00	0.00	0.00	0.0%
Buildings and Improvements of Buildings		6200	0.00	0.00	0.00	0.00	0.00	0.0%
Books and Media for New School Libraries or Major Expansion of School Libraries		6300	0.00	0.00	0.00	0.00	0.00	0.0%
Equipment		6400	0.00	0.00	0.00	0.00	0.00	0.0%
Equipment Replacement		6500	0.00	0.00	0.00	0.00	0.00	0.0%
Lease Assets		6600	0.00	0.00	0.00	0.00	0.00	0.0%
Subscription Assets		6700	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CAPITAL OUTLAY			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER OUTGO (excluding Transfers of Indirect Costs)								
Other Transfers Out								
Transfers of Pass-Through Revenues								
To Districts or Charter Schools		7211	0.00	0.00	0.00	0.00	0.00	0.0%
To County Offices		7212	0.00	0.00	0.00	0.00	0.00	0.0%
To JPAs		7213	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers Out to All Others		7299	0.00	0.00	0.00	0.00	0.00	0.0%
Debt Service								
Debt Service - Interest		7438	0.00	0.00	0.00	0.00	0.00	0.0%
Other Debt Service - Principal		7439	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER OUTGO (excluding Transfers of Indirect Costs)			0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, EXPENDITURES			0.00	0.00	0.00	0.00		
INTERFUND TRANSFERS								
INTERFUND TRANSFERS IN								
To: State School Building Fund/County School Facilities Fund		8913	0.00	0.00	0.00	0.00	0.00	0.0%
From: All Other Funds								
Other Authorized Interfund Transfers In		8919	0.00	0.00	0.00	0.00	0.00	0.0%
(a) TOTAL, INTERFUND TRANSFERS IN			0.00	0.00	0.00	0.00	0.00	0.0%
INTERFUND TRANSFERS OUT								
To: State School Building Fund/County School Facilities Fund		7613	0.00	0.00	0.00	0.00	0.00	0.0%
Other Authorized Interfund Transfers Out		7619	0.00	0.00	0.00	0.00	0.00	0.0%
(b) TOTAL, INTERFUND TRANSFERS OUT			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER SOURCES/USES								

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
SOURCES								
Proceeds								
Proceeds from Sale/Lease-Purchase of Land/Buildings		8953	0.00	0.00	0.00	0.00	0.00	0.0%
Other Sources								
Transfers from Funds of Lapsed/Reorganized LEAs		8965	0.00	0.00	0.00	0.00	0.00	0.0%
Long-Term Debt Proceeds								
Proceeds from Certificates of Participation		8971	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from Leases		8972	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from Lease Revenue Bonds		8973	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from SBITAs		8974	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Sources		8979	0.00	0.00	0.00	0.00	0.00	0.0%
(c) TOTAL, SOURCES			0.00	0.00	0.00	0.00	0.00	0.0%
USES								
Transfers of Funds from Lapsed/Reorganized LEAs		7651	0.00	0.00	0.00	0.00	0.00	0.0%
(d) TOTAL, USES			0.00	0.00	0.00	0.00	0.00	0.0%
CONTRIBUTIONS								
Contributions from Unrestricted Revenues		8980	0.00	0.00	0.00	0.00	0.00	0.0%
Contributions from Restricted Revenues		8990	0.00	0.00	0.00	0.00	0.00	0.0%
(e) TOTAL, CONTRIBUTIONS			0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER FINANCING SOURCES/USES								
(a - b + c - d + e)			0.00	0.00	0.00	0.00		

Resource	Description	2023-24 Projected Totals
7710	State School Facilities Projects	3,553.00
Total, Restricted Balance		3,553.00

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
A. REVENUES								
1) LCFF Sources		8010-8099	0.00	0.00	0.00	0.00	0.00	0.0%
2) Federal Revenue		8100-8299	0.00	0.00	0.00	0.00	0.00	0.0%
3) Other State Revenue		8300-8599	0.00	0.00	0.00	0.00	0.00	0.0%
4) Other Local Revenue		8600-8799	351,100.00	351,100.00	3,594.10	351,100.00	0.00	0.0%
5) TOTAL, REVENUES			351,100.00	351,100.00	3,594.10	351,100.00		
B. EXPENDITURES								
1) Certificated Salaries		1000-1999	0.00	0.00	0.00	0.00	0.00	0.0%
2) Classified Salaries		2000-2999	0.00	0.00	0.00	0.00	0.00	0.0%
3) Employee Benefits		3000-3999	0.00	0.00	0.00	0.00	0.00	0.0%
4) Books and Supplies		4000-4999	0.00	0.00	0.00	0.00	0.00	0.0%
5) Services and Other Operating Expenditures		5000-5999	6,100.00	6,100.00	0.00	6,100.00	0.00	0.0%
6) Capital Outlay		6000-6999	0.00	0.00	0.00	0.00	0.00	0.0%
7) Other Outgo (excluding Transfers of Indirect Costs)		7100-7299, 7400-7499	0.00	0.00	0.00	0.00	0.00	0.0%
8) Other Outgo - Transfers of Indirect Costs		7300-7399	0.00	0.00	0.00	0.00	0.00	0.0%
9) TOTAL, EXPENDITURES			6,100.00	6,100.00	0.00	6,100.00		
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B9)			345,000.00	345,000.00	3,594.10	345,000.00		
D. OTHER FINANCING SOURCES/USES								
1) Interfund Transfers								
a) Transfers In		8900-8929	0.00	0.00	0.00	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.00	0.00	0.00	0.0%
2) Other Sources/Uses								
a) Sources		8930-8979	0.00	0.00	0.00	0.00	0.00	0.0%
b) Uses		7630-7699	0.00	0.00	0.00	0.00	0.00	0.0%
3) Contributions		8980-8999	0.00	0.00	0.00	0.00	0.00	0.0%
4) TOTAL, OTHER FINANCING SOURCES/USES			0.00	0.00	0.00	0.00		
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)			345,000.00	345,000.00	3,594.10	345,000.00		
F. FUND BALANCE, RESERVES								
1) Beginning Fund Balance								
a) As of July 1 - Unaudited		9791	930,329.98	930,329.98		930,329.98	0.00	0.0%
b) Audit Adjustments		9793	0.00	0.00		0.00	0.00	0.0%
c) As of July 1 - Audited (F1a + F1b)			930,329.98	930,329.98		930,329.98		
d) Other Restatements		9795	0.00	0.00		0.00	0.00	0.0%
e) Adjusted Beginning Balance (F1c + F1d)			930,329.98	930,329.98		930,329.98		
2) Ending Balance, June 30 (E + F1e)			1,275,329.98	1,275,329.98		1,275,329.98		
Components of Ending Fund Balance								
a) Nonspendable								
Revolving Cash		9711	0.00	0.00		0.00		
Stores		9712	0.00	0.00		0.00		
Prepaid Items		9713	0.00	0.00		0.00		
All Others		9719	0.00	0.00		0.00		
b) Legally Restricted Balance		9740	93,267.32	93,267.32		93,267.32		
c) Committed								

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Stabilization Arrangements		9750	0.00	0.00		0.00		
Other Commitments		9760	0.00	0.00		0.00		
d) Assigned								
Other Assignments		9780	1,182,062.66	1,182,062.66		1,182,062.66		
e) Unassigned/Unappropriated								
Reserve for Economic Uncertainties		9789	0.00	0.00		0.00		
Unassigned/Unappropriated Amount		9790	0.00	0.00		0.00		
FEDERAL REVENUE								
All Other Federal Revenue		8290	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, FEDERAL REVENUE			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER STATE REVENUE								
Tax Relief Subventions								
Restricted Levies - Other								
Homeowners' Exemptions		8575	0.00	0.00	0.00	0.00	0.00	0.0%
Other Subventions/In-Lieu Taxes		8576	0.00	0.00	0.00	0.00	0.00	0.0%
All Other State Revenue		8590	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER STATE REVENUE			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER LOCAL REVENUE								
County and District Taxes								
Other Restricted Levies								
Secured Roll		8615	0.00	0.00	0.00	0.00	0.00	0.0%
Unsecured Roll		8616	0.00	0.00	0.00	0.00	0.00	0.0%
Prior Years' Taxes		8617	0.00	0.00	0.00	0.00	0.00	0.0%
Supplemental Taxes		8618	0.00	0.00	0.00	0.00	0.00	0.0%
Non-Ad Valorem Taxes								
Parcel Taxes		8621	0.00	0.00	0.00	0.00	0.00	0.0%
Other		8622	0.00	0.00	0.00	0.00	0.00	0.0%
Community Redevelopment Funds Not Subject to LCFF Deduction		8625	0.00	0.00	0.00	0.00	0.00	0.0%
Penalties and Interest from Delinquent Non-LCFF Taxes		8629	0.00	0.00	0.00	0.00	0.00	0.0%
Sales								
Sale of Equipment/Supplies		8631	0.00	0.00	0.00	0.00	0.00	0.0%
Leases and Rentals		8650	0.00	0.00	0.00	0.00	0.00	0.0%
Interest		8660	351,100.00	351,100.00	0.00	351,100.00	0.00	0.0%
Net Increase (Decrease) in the Fair Value of Investments		8662	0.00	0.00	3,594.10	0.00	0.00	0.0%
Other Local Revenue								
All Other Local Revenue		8699	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers In from All Others		8799	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER LOCAL REVENUE			351,100.00	351,100.00	3,594.10	351,100.00	0.00	0.0%
TOTAL, REVENUES			351,100.00	351,100.00	3,594.10	351,100.00		
CLASSIFIED SALARIES								
Classified Support Salaries		2200	0.00	0.00	0.00	0.00	0.00	0.0%
Classified Supervisors' and Administrators' Salaries		2300	0.00	0.00	0.00	0.00	0.00	0.0%
Clerical, Technical and Office Salaries		2400	0.00	0.00	0.00	0.00	0.00	0.0%
Other Classified Salaries		2900	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CLASSIFIED SALARIES			0.00	0.00	0.00	0.00	0.00	0.0%

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
EMPLOYEE BENEFITS								
STRS		3101-3102	0.00	0.00	0.00	0.00	0.00	0.0%
PERS		3201-3202	0.00	0.00	0.00	0.00	0.00	0.0%
OASDI/Medicare/Alternative Health and Welfare Benefits		3301-3302	0.00	0.00	0.00	0.00	0.00	0.0%
Unemployment Insurance		3401-3402	0.00	0.00	0.00	0.00	0.00	0.0%
Workers' Compensation		3501-3502	0.00	0.00	0.00	0.00	0.00	0.0%
OPEB, Allocated		3601-3602	0.00	0.00	0.00	0.00	0.00	0.0%
OPEB, Active Employees		3701-3702	0.00	0.00	0.00	0.00	0.00	0.0%
Other Employee Benefits		3751-3752	0.00	0.00	0.00	0.00	0.00	0.0%
Other Employee Benefits		3901-3902	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, EMPLOYEE BENEFITS			0.00	0.00	0.00	0.00	0.00	0.0%
BOOKS AND SUPPLIES								
Books and Other Reference Materials		4200	0.00	0.00	0.00	0.00	0.00	0.0%
Materials and Supplies		4300	0.00	0.00	0.00	0.00	0.00	0.0%
Noncapitalized Equipment		4400	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, BOOKS AND SUPPLIES			0.00	0.00	0.00	0.00	0.00	0.0%
SERVICES AND OTHER OPERATING EXPENDITURES								
Subagreements for Services		5100	0.00	0.00	0.00	0.00	0.00	0.0%
Travel and Conferences		5200	0.00	0.00	0.00	0.00	0.00	0.0%
Insurance		5400-5450	0.00	0.00	0.00	0.00	0.00	0.0%
Operations and Housekeeping Services		5500	0.00	0.00	0.00	0.00	0.00	0.0%
Rentals, Leases, Repairs, and Noncapitalized Improvements		5600	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Direct Costs		5710	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Direct Costs - Interfund		5750	0.00	0.00	0.00	0.00	0.00	0.0%
Professional/Consulting Services and Operating Expenditures		5800	6,100.00	6,100.00	0.00	6,100.00	0.00	0.0%
Communications		5900	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, SERVICES AND OTHER OPERATING EXPENDITURES			6,100.00	6,100.00	0.00	6,100.00	0.00	0.0%
CAPITAL OUTLAY								
Land		6100	0.00	0.00	0.00	0.00	0.00	0.0%
Land Improvements		6170	0.00	0.00	0.00	0.00	0.00	0.0%
Buildings and Improvements of Buildings		6200	0.00	0.00	0.00	0.00	0.00	0.0%
Books and Media for New School Libraries or Major Expansion of School Libraries		6300	0.00	0.00	0.00	0.00	0.00	0.0%
Equipment		6400	0.00	0.00	0.00	0.00	0.00	0.0%
Equipment Replacement		6500	0.00	0.00	0.00	0.00	0.00	0.0%
Lease Assets		6600	0.00	0.00	0.00	0.00	0.00	0.0%
Subscription Assets		6700	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CAPITAL OUTLAY			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER OUTGO (excluding Transfers of Indirect Costs)								
Other Transfers Out								
Transfers of Pass-Through Revenues								
To Districts or Charter Schools		7211	0.00	0.00	0.00	0.00	0.00	0.0%
To County Offices		7212	0.00	0.00	0.00	0.00	0.00	0.0%
To JPAs		7213	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers Out to All Others		7299	0.00	0.00	0.00	0.00	0.00	0.0%

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Debt Service								
Repayment of State School Building Fund Aid - Proceeds from Bonds		7435	0.00	0.00	0.00	0.00	0.00	0.0%
Debt Service - Interest		7438	0.00	0.00	0.00	0.00	0.00	0.0%
Other Debt Service - Principal		7439	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER OUTGO (excluding Transfers of Indirect Costs)			0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, EXPENDITURES			6,100.00	6,100.00	0.00	6,100.00		
INTERFUND TRANSFERS								
INTERFUND TRANSFERS IN								
Other Authorized Interfund Transfers In		8919	0.00	0.00	0.00	0.00	0.00	0.0%
(a) TOTAL, INTERFUND TRANSFERS IN			0.00	0.00	0.00	0.00	0.00	0.0%
INTERFUND TRANSFERS OUT								
To: State School Building Fund/County School Facilities Fund		7613	0.00	0.00	0.00	0.00	0.00	0.0%
Other Authorized Interfund Transfers Out		7619	0.00	0.00	0.00	0.00	0.00	0.0%
(b) TOTAL, INTERFUND TRANSFERS OUT			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER SOURCES/USES								
SOURCES								
Proceeds								
Proceeds from Sale of Bonds		8951	0.00	0.00	0.00	0.00	0.00	0.0%
Other Sources								
County School Building Aid		8961	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers from Funds of Lapsed/Reorganized LEAs		8965	0.00	0.00	0.00	0.00	0.00	0.0%
Long-Term Debt Proceeds								
Proceeds from Certificates of Participation		8971	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from Leases		8972	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from Lease Revenue Bonds		8973	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from SBITAs		8974	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Sources		8979	0.00	0.00	0.00	0.00	0.00	0.0%
(c) TOTAL, SOURCES			0.00	0.00	0.00	0.00	0.00	0.0%
USES								
Transfers of Funds from Lapsed/Reorganized LEAs		7651	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Uses		7699	0.00	0.00	0.00	0.00	0.00	0.0%
(d) TOTAL, USES			0.00	0.00	0.00	0.00	0.00	0.0%
CONTRIBUTIONS								
Contributions from Unrestricted Revenues		8980	0.00	0.00	0.00	0.00	0.00	0.0%
Contributions from Restricted Revenues		8990	0.00	0.00	0.00	0.00	0.00	0.0%
(e) TOTAL, CONTRIBUTIONS			0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER FINANCING SOURCES/USES								
(a - b + c - d + e)			0.00	0.00	0.00	0.00		

Resource	Description	2023-24 Projected Totals
9010	Other Restricted Local	93,267.32
Total, Restricted Balance		93,267.32

Description	Object Codes	Projected Year Totals (Form 011) (A)	% Change (Cols. C-A/A) (B)	2024-25 Projection (C)	% Change (Cols. E-C/C) (D)	2025-26 Projection (E)
(Enter projections for subsequent years 1 and 2 in Columns C and E; current year - Column A - is extracted)						
A. REVENUES AND OTHER FINANCING SOURCES						
1. LCFF/Revenue Limit Sources	8010-8099	24,713,930.00	1.33%	25,043,711.00	4.54%	26,181,610.00
2. Federal Revenues	8100-8299	0.00	0.00%		0.00%	
3. Other State Revenues	8300-8599	378,375.34	0.00%	378,375.00	0.00%	378,375.00
4. Other Local Revenues	8600-8799	265,313.13	0.00%	265,313.00	0.00%	265,313.00
5. Other Financing Sources						
a. Transfers In	8900-8929	0.00	0.00%		0.00%	
b. Other Sources	8930-8979	0.00	0.00%		0.00%	
c. Contributions	8980-8999	(5,054,413.84)	0.00%	(5,054,414.00)	4.34%	(5,273,684.21)
6. Total (Sum lines A1 thru A5c)		20,303,204.63	1.62%	20,632,985.00	4.45%	21,551,613.79
B. EXPENDITURES AND OTHER FINANCING USES						
1. Certificated Salaries						
a. Base Salaries				9,309,471.06		9,588,755.06
b. Step & Column Adjustment				279,284.00		287,663.00
c. Cost-of-Living Adjustment						
d. Other Adjustments						
e. Total Certificated Salaries (Sum lines B1a thru B1d)	1000-1999	9,309,471.06	3.00%	9,588,755.06	3.00%	9,876,418.06
2. Classified Salaries						
a. Base Salaries				3,386,626.51		3,488,225.51
b. Step & Column Adjustment				101,599.00		104,647.00
c. Cost-of-Living Adjustment						
d. Other Adjustments						
e. Total Classified Salaries (Sum lines B2a thru B2d)	2000-2999	3,386,626.51	3.00%	3,488,225.51	3.00%	3,592,872.51
3. Employee Benefits	3000-3999	5,046,005.34	1.00%	5,096,465.00	1.00%	5,147,430.00
4. Books and Supplies	4000-4999	669,315.29	(2.89%)	650,000.00	0.00%	650,000.00
5. Services and Other Operating Expenditures	5000-5999	3,244,556.40	(13.70%)	2,800,000.00	0.00%	2,800,000.00
6. Capital Outlay	6000-6999	437,586.03	(54.29%)	200,000.00	0.00%	200,000.00
7. Other Outgo (excluding Transfers of Indirect Costs)	7100-7299, 7400-7499	52,000.00	0.00%	52,000.00	0.00%	52,000.00
8. Other Outgo - Transfers of Indirect Costs	7300-7399	(47,065.93)	0.00%	(47,066.00)	0.00%	(47,066.00)
9. Other Financing Uses						
a. Transfers Out	7600-7629	0.00	0.00%	0.00	0.00%	0.00
b. Other Uses	7630-7699	0.00	0.00%	0.00	0.00%	0.00
10. Other Adjustments (Explain in Section F below)						
11. Total (Sum lines B1 thru B10)		22,098,494.70	(1.22%)	21,828,379.57	2.03%	22,271,654.57
C. NET INCREASE (DECREASE) IN FUND BALANCE (Line A6 minus line B11)		(1,795,290.07)		(1,195,394.57)		(720,040.78)
D. FUND BALANCE						
1. Net Beginning Fund Balance (Form 011, line F1e)		9,343,971.65		7,548,681.58		6,353,287.01
2. Ending Fund Balance (Sum lines C and D1)		7,548,681.58		6,353,287.01		5,633,246.23
3. Components of Ending Fund Balance (Form 011)						
a. Nonspendable	9710-9719	15,000.00		15,000.00		15,000.00
b. Restricted	9740					
c. Committed						
1. Stabilization Arrangements	9750	0.00				
2. Other Commitments	9760	0.00				
d. Assigned	9780	0.00				
e. Unassigned/Unappropriated						
1. Reserve for Economic Uncertainties	9789	1,895,706.00		1,711,703.00		1,645,197.00

Description	Object Codes	Projected Year Totals (Form 011) (A)	% Change (Cols. C-A/A) (B)	2024-25 Projection (C)	% Change (Cols. E-C/C) (D)	2025-26 Projection (E)
2. Unassigned/Unappropriated	9790	5,637,975.58		4,626,584.01		3,973,049.23
f. Total Components of Ending Fund Balance (Line D3f must agree with line D2)		7,548,681.58		6,353,287.01		5,633,246.23
E. AVAILABLE RESERVES						
1. General Fund						
a. Stabilization Arrangements	9750	0.00		0.00		0.00
b. Reserve for Economic Uncertainties	9789	1,895,706.00		1,711,703.00		1,645,197.00
c. Unassigned/Unappropriated	9790	5,637,975.58		4,626,584.01		3,973,049.23
(Enter other reserve projections in Columns C and E for subsequent years 1 and 2; current year - Column A - is extracted)						
2. Special Reserve Fund - Noncapital Outlay (Fund 17)						
a. Stabilization Arrangements	9750	0.00				
b. Reserve for Economic Uncertainties	9789	0.00				
c. Unassigned/Unappropriated	9790	0.00				
3. Total Available Reserves (Sum lines E1a thru E2c)		7,533,681.58		6,338,287.01		5,618,246.23
F. ASSUMPTIONS						
Please provide below or on a separate attachment, the assumptions used to determine the projections for the first and second subsequent fiscal years. Further, please include an explanation for any significant expenditure adjustments projected in lines B1d, B2d, and B10. For additional information, please refer to the Budget Assumptions section of the SACS Financial Reporting Software User Guide.						

Description	Object Codes	Projected Year Totals (Form 011) (A)	% Change (Cols. C-A/A) (B)	2024-25 Projection (C)	% Change (Cols. E-C/C) (D)	2025-26 Projection (E)
(Enter projections for subsequent years 1 and 2 in Columns C and E; current year - Column A - is extracted)						
A. REVENUES AND OTHER FINANCING SOURCES						
1. LCFF/Revenue Limit Sources	8010-8099	0.00	0.00%	0.00	0.00%	0.00
2. Federal Revenues	8100-8299	4,299,686.93	(61.38%)	1,660,564.00	3.29%	1,715,196.00
3. Other State Revenues	8300-8599	3,313,627.27	(13.59%)	2,863,275.00	3.29%	2,957,478.00
4. Other Local Revenues	8600-8799	907,291.19	(100.00%)		0.00%	
5. Other Financing Sources						
a. Transfers In	8900-8929	0.00	0.00%		0.00%	
b. Other Sources	8930-8979	0.00	0.00%		0.00%	
c. Contributions	8980-8999	5,054,413.84	0.00%	5,054,414.00	4.34%	5,273,684.21
6. Total (Sum lines A1 thru A5c)		13,575,019.23	(29.44%)	9,578,253.00	3.84%	9,946,358.21
B. EXPENDITURES AND OTHER FINANCING USES						
1. Certificated Salaries						
a. Base Salaries				3,183,177.98		3,278,672.98
b. Step & Column Adjustment				95,495.00		98,360.00
c. Cost-of-Living Adjustment						
d. Other Adjustments						
e. Total Certificated Salaries (Sum lines B1a thru B1d)	1000-1999	3,183,177.98	3.00%	3,278,672.98	3.00%	3,377,032.98
2. Classified Salaries						
a. Base Salaries				1,528,735.93		1,574,597.93
b. Step & Column Adjustment				45,862.00		47,238.00
c. Cost-of-Living Adjustment						
d. Other Adjustments						
e. Total Classified Salaries (Sum lines B2a thru B2d)	2000-2999	1,528,735.93	3.00%	1,574,597.93	3.00%	1,621,835.93
3. Employee Benefits	3000-3999	2,634,654.53	1.00%	2,661,002.00	1.00%	2,687,612.00
4. Books and Supplies	4000-4999	4,312,249.93	(42.03%)	2,500,000.00	(80.00%)	500,000.00
5. Services and Other Operating Expenditures	5000-5999	2,931,577.31	(29.68%)	2,061,472.00	2.64%	2,115,895.00
6. Capital Outlay	6000-6999	1,195,283.02	(74.90%)	300,000.00	0.00%	300,000.00
7. Other Outgo (excluding Transfers of Indirect Costs)	7100-7299, 7400-7499	0.00	0.00%		0.00%	
8. Other Outgo - Transfers of Indirect Costs	7300-7399	29,943.93	0.00%	29,944.00	0.00%	29,944.00
9. Other Financing Uses						
a. Transfers Out	7600-7629	0.00	0.00%		0.00%	
b. Other Uses	7630-7699	0.00	0.00%		0.00%	
10. Other Adjustments (Explain in Section F below)						
11. Total (Sum lines B1 thru B10)		15,815,622.63	(21.56%)	12,405,688.91	(14.29%)	10,632,319.91
C. NET INCREASE (DECREASE) IN FUND BALANCE						
(Line A6 minus line B11)		(2,240,603.40)		(2,827,435.91)		(685,961.70)
D. FUND BALANCE						
1. Net Beginning Fund Balance (Form 011, line F1e)		5,754,001.01		3,513,397.61		685,961.70
2. Ending Fund Balance (Sum lines C and D1)		3,513,397.61		685,961.70		0.00
3. Components of Ending Fund Balance (Form 011)						
a. Nonspendable	9710-9719	0.00				
b. Restricted	9740	3,513,397.61		685,961.70		
c. Committed						
1. Stabilization Arrangements	9750					
2. Other Commitments	9760					
d. Assigned	9780					
e. Unassigned/Unappropriated						
1. Reserve for Economic Uncertainties	9789					

Description	Object Codes	Projected Year Totals (Form 011) (A)	% Change (Cols. C-A/A) (B)	2024-25 Projection (C)	% Change (Cols. E-C/C) (D)	2025-26 Projection (E)
2. Unassigned/Unappropriated	9790	0.00		0.00		0.00
f. Total Components of Ending Fund Balance (Line D3f must agree with line D2)		3,513,397.61		685,961.70		0.00
E. AVAILABLE RESERVES						
1. General Fund)						
a. Stabilization Arrangements	9750					
b. Reserve for Economic Uncertainties	9789					
c. Unassigned/Unappropriated Amount	9790					
(Enter current year reserve projections in Column A, and other reserve projections in Columns C and E for subsequent years 1 and 2)						
2. Special Reserve Fund - Noncapital Outlay (Fund 17)						
a. Stabilization Arrangements	9750					
b. Reserve for Economic Uncertainties	9789					
c. Unassigned/Unappropriated	9790					
3. Total Available Reserves (Sum lines E1a thru E2c)						
F. ASSUMPTIONS						
Please provide below or on a separate attachment, the assumptions used to determine the projections for the first and second subsequent fiscal years. Further, please include an explanation for any significant expenditure adjustments projected in lines B1d, B2d, and B10. For additional information, please refer to the Budget Assumptions section of the SACS Financial Reporting Software User Guide.						

Description	Object Codes	Projected Year Totals (Form 011) (A)	% Change (Cols. C-A/A) (B)	2024-25 Projection (C)	% Change (Cols. E-C/C) (D)	2025-26 Projection (E)
(Enter projections for subsequent years 1 and 2 in Columns C and E; current year - Column A - is extracted)						
A. REVENUES AND OTHER FINANCING SOURCES						
1. LCFF/Revenue Limit Sources	8010-8099	24,713,930.00	1.33%	25,043,711.00	4.54%	26,181,610.00
2. Federal Revenues	8100-8299	4,299,686.93	(61.38%)	1,660,564.00	3.29%	1,715,196.00
3. Other State Revenues	8300-8599	3,692,002.61	(12.20%)	3,241,650.00	2.91%	3,335,853.00
4. Other Local Revenues	8600-8799	1,172,604.32	(77.37%)	265,313.00	0.00%	265,313.00
5. Other Financing Sources						
a. Transfers In	8900-8929	0.00	0.00%	0.00	0.00%	0.00
b. Other Sources	8930-8979	0.00	0.00%	0.00	0.00%	0.00
c. Contributions	8980-8999	0.00	0.00%	0.00	0.00%	0.00
6. Total (Sum lines A1 thru A5c)		33,878,223.86	(10.82%)	30,211,238.00	4.26%	31,497,972.00
B. EXPENDITURES AND OTHER FINANCING USES						
1. Certificated Salaries						
a. Base Salaries				12,492,649.04		12,867,428.04
b. Step & Column Adjustment				374,779.00		386,023.00
c. Cost-of-Living Adjustment				0.00		0.00
d. Other Adjustments				0.00		0.00
e. Total Certificated Salaries (Sum lines B1a thru B1d)	1000-1999	12,492,649.04	3.00%	12,867,428.04	3.00%	13,253,451.04
2. Classified Salaries						
a. Base Salaries				4,915,362.44		5,062,823.44
b. Step & Column Adjustment				147,461.00		151,885.00
c. Cost-of-Living Adjustment				0.00		0.00
d. Other Adjustments				0.00		0.00
e. Total Classified Salaries (Sum lines B2a thru B2d)	2000-2999	4,915,362.44	3.00%	5,062,823.44	3.00%	5,214,708.44
3. Employee Benefits	3000-3999	7,680,659.87	1.00%	7,757,467.00	1.00%	7,835,042.00
4. Books and Supplies	4000-4999	4,981,565.22	(36.77%)	3,150,000.00	(63.49%)	1,150,000.00
5. Services and Other Operating Expenditures	5000-5999	6,176,133.71	(21.29%)	4,861,472.00	1.12%	4,915,895.00
6. Capital Outlay	6000-6999	1,632,869.05	(69.38%)	500,000.00	0.00%	500,000.00
7. Other Outgo (excluding Transfers of Indirect Costs)	7100-7299, 7400-7499	52,000.00	0.00%	52,000.00	0.00%	52,000.00
8. Other Outgo - Transfers of Indirect Costs	7300-7399	(17,122.00)	0.00%	(17,122.00)	0.00%	(17,122.00)
9. Other Financing Uses						
a. Transfers Out	7600-7629	0.00	0.00%	0.00	0.00%	0.00
b. Other Uses	7630-7699	0.00	0.00%	0.00	0.00%	0.00
10. Other Adjustments				0.00		0.00
11. Total (Sum lines B1 thru B10)		37,914,117.33	(9.71%)	34,234,068.48	(3.89%)	32,903,974.48
C. NET INCREASE (DECREASE) IN FUND BALANCE						
(Line A6 minus line B11)		(4,035,893.47)		(4,022,830.48)		(1,406,002.48)
D. FUND BALANCE						
1. Net Beginning Fund Balance (Form 011, line F1e)		15,097,972.66		11,062,079.19		7,039,248.71
2. Ending Fund Balance (Sum lines C and D1)		11,062,079.19		7,039,248.71		5,633,246.23
3. Components of Ending Fund Balance (Form 011)						
a. Nonspendable	9710-9719	15,000.00		15,000.00		15,000.00
b. Restricted	9740	3,513,397.61		685,961.70		0.00
c. Committed						
1. Stabilization Arrangements	9750	0.00		0.00		0.00
2. Other Commitments	9760	0.00		0.00		0.00
d. Assigned	9780	0.00		0.00		0.00
e. Unassigned/Unappropriated						
1. Reserve for Economic Uncertainties	9789	1,895,706.00		1,711,703.00		1,645,197.00

Description	Object Codes	Projected Year Totals (Form 011) (A)	% Change (Cols. C-A/A) (B)	2024-25 Projection (C)	% Change (Cols. E-C/C) (D)	2025-26 Projection (E)
2. Unassigned/Unappropriated	9790	5,637,975.58		4,626,584.01		3,973,049.23
f. Total Components of Ending Fund Balance (Line D3f must agree with line D2)		11,062,079.19		7,039,248.71		5,633,246.23
E. AVAILABLE RESERVES (Unrestricted except as noted)						
1. General Fund						
a. Stabilization Arrangements	9750	0.00		0.00		0.00
b. Reserve for Economic Uncertainties	9789	1,895,706.00		1,711,703.00		1,645,197.00
c. Unassigned/Unappropriated	9790	5,637,975.58		4,626,584.01		3,973,049.23
d. Negative Restricted Ending Balances (Negative resources 2000-9999)	979Z			0.00		0.00
2. Special Reserve Fund - Noncapital Outlay (Fund 17)						
a. Stabilization Arrangements	9750	0.00		0.00		0.00
b. Reserve for Economic Uncertainties	9789	0.00		0.00		0.00
c. Unassigned/Unappropriated	9790	0.00		0.00		0.00
3. Total Available Reserves - by Amount (Sum lines E1 thru E2c)		7,533,681.58		6,338,287.01		5,618,246.23
4. Total Available Reserves - by Percent (Line E3 divided by Line F3c)		19.87%		18.51%		17.07%
F. RECOMMENDED RESERVES						
1. Special Education Pass-through Exclusions						
For districts that serve as the administrative unit (AU) of a special education local plan area (SELPA):						
a. Do you choose to exclude from the reserve calculation the pass-through funds distributed to SELPA members?	Yes					
b. If you are the SELPA AU and are excluding special education pass-through funds:						
1. Enter the name(s) of the SELPA(s):						
2. Special education pass-through funds (Column A: Fund 10, resources 3300-3499, 6500-6540 and 6546 objects 7211-7213 and 7221-7223; enter projections for subsequent years 1 and 2 in Columns C and E)						
		0.00				
2. District ADA						
Used to determine the reserve standard percentage level on line F3d (Col. A: Form AI, Estimated P-2 ADA column, Lines A4 and C4; enter projections)						
		1,607.00		1,629.37		1,621.37
3. Calculating the Reserves						
a. Expenditures and Other Financing Uses (Line B11)		37,914,117.33		34,234,068.48		32,903,974.48
b. Plus: Special Education Pass-through Funds (Line F1b2, if Line F1a is No)		0.00		0.00		0.00
c. Total Expenditures and Other Financing Uses (Line F3a plus line F3b)		37,914,117.33		34,234,068.48		32,903,974.48
d. Reserve Standard Percentage Level (Refer to Form 01CSI, Criterion 10 for calculation details)		3%		3%		3%
e. Reserve Standard - By Percent (Line F3c times F3d)		1,137,423.52		1,027,022.05		987,119.23
f. Reserve Standard - By Amount (Refer to Form 01CSI, Criterion 10 for calculation details)		0.00		0.00		0.00
g. Reserve Standard (Greater of Line F3e or F3f)		1,137,423.52		1,027,022.05		987,119.23
h. Available Reserves (Line E3) Meet Reserve Standard (Line F3g)		YES		YES		YES

Description	Object Codes	Projected Year Totals (A)	% Change (Cols. C-A/A) (B)	2024-25 Projection (C)	% Change (Cols. E-C/C) (D)	2025-26 Projection (E)
(Enter projections for subsequent years 1 and 2 in Columns C and E; current year - Column A - is extracted)						
A. REVENUES AND OTHER FINANCING SOURCES						
1. LCFF/Revenue Limit Sources	8010-8099	0.00	0.00%		0.00%	
2. Federal Revenues	8100-8299	0.00	0.00%		0.00%	
3. Other State Revenues	8300-8599	477,927.00	0.00%	477,927.00	0.00%	477,927.00
4. Other Local Revenues	8600-8799	850.00	0.00%	850.00	0.00%	850.00
5. Other Financing Sources						
a. Transfers In	8900-8929	0.00	0.00%		0.00%	
b. Other Sources	8930-8979	0.00	0.00%		0.00%	
c. Contributions	8980-8999	0.00	0.00%		0.00%	
6. Total (Sum lines A1 thru A5c)		478,777.00	0.00%	478,777.00	0.00%	478,777.00
B. EXPENDITURES AND OTHER FINANCING USES						
1. Certificated Salaries	1000-1999	7,315.00	2.99%	7,534.00	3.00%	7,760.00
2. Classified Salaries	2000-2999	279,338.58	3.00%	287,719.00	3.00%	296,351.00
3. Employee Benefits	3000-3999	128,938.24	1.00%	130,227.00	1.00%	131,530.00
4. Books and Supplies	4000-4999	46,104.61	(21.92%)	36,000.00	(27.78%)	26,000.00
5. Services and Other Operating Expenditures	5000-5999	4,009.79	(.24%)	4,000.00	0.00%	4,000.00
6. Capital Outlay	6000-6999	0.00	0.00%		0.00%	
7. Other Outgo (excluding Transfers of Indirect Costs)	7100-7299, 7400-7499	0.00	0.00%		0.00%	
8. Other Outgo - Transfers of Indirect Costs	7300-7399	12,851.00	0.00%	12,851.00	0.00%	12,851.00
9. Other Financing Uses						
a. Transfers Out	7600-7629	0.00	0.00%		0.00%	
b. Other Uses	7630-7699	0.00	0.00%		0.00%	
10. Other Adjustments (Explain in Section E below)						
11. Total (Sum lines B1 thru B10)		478,557.22	(.05%)	478,331.00	.03%	478,492.00
C. NET INCREASE(DECREASE) IN FUND BALANCE (Line A6 minus line B11)						
		219.78		446.00		285.00
D. FUND BALANCE						
1. Net Beginning Fund Balance	9791-9795	(219.78)		0.00		446.00
2. Ending Fund Balance (Sum lines C and D1)		0.00		446.00		731.00
3. Components of Ending Fund Balance						
a. Nonspendable	9710-9719	0.00				
b. Restricted	9740	0.00		446.00		731.00
c. Committed						
1. Stabilization Arrangements	9750	0.00				
2. Other Commitments	9760	0.00				
d. Assigned	9780	0.00				
e. Unassigned/Unappropriated						
1. Reserve for Economic Uncertainties	9789	0.00				
2. Unassigned/Unappropriated	9790	0.00		0.00		0.00
f. Total Components of Ending Fund Balance (Line D3f must agree with Line D2)		0.00		446.00		731.00
E. ASSUMPTIONS Please provide below or on a separate attachment the assumptions used to determine the projections for the first and second subsequent fiscal years.						

Description	Object Codes	Projected Year Totals (A)	% Change (Cols. C-A/A) (B)	2024-25 Projection (C)	% Change (Cols. E-C/C) (D)	2025-26 Projection (E)
(Enter projections for subsequent years 1 and 2 in Columns C and E; current year - Column A - is extracted)						
A. REVENUES AND OTHER FINANCING SOURCES						
1. LCFF/Revenue Limit Sources	8010-8099	0.00	0.00%		0.00%	
2. Federal Revenues	8100-8299	979,116.00	0.00%	979,116.00	0.00%	979,116.00
3. Other State Revenues	8300-8599	506,083.28	0.00%	506,083.00	0.00%	506,083.00
4. Other Local Revenues	8600-8799	1,348.75	(.06%)	1,348.00	0.00%	1,348.00
5. Other Financing Sources						
a. Transfers In	8900-8929	0.00	0.00%		0.00%	
b. Other Sources	8930-8979	0.00	0.00%		0.00%	
c. Contributions	8980-8999	0.00	0.00%		0.00%	
6. Total (Sum lines A1 thru A5c)		1,486,548.03	0.00%	1,486,547.00	0.00%	1,486,547.00
B. EXPENDITURES AND OTHER FINANCING USES						
1. Certificated Salaries	1000-1999	0.00	0.00%		0.00%	
2. Classified Salaries	2000-2999	471,224.63	3.00%	485,361.00	3.00%	499,922.00
3. Employee Benefits	3000-3999	208,228.09	1.00%	210,310.00	1.00%	212,413.00
4. Books and Supplies	4000-4999	18,627.03	2.00%	19,000.00	0.00%	19,000.00
5. Services and Other Operating Expenditures	5000-5999	714,176.16	3.00%	735,601.00	3.00%	757,669.00
6. Capital Outlay	6000-6999	0.00	0.00%		0.00%	
7. Other Outgo (excluding Transfers of Indirect Costs)	7100-7299, 7400-7499	0.00	0.00%		0.00%	
8. Other Outgo - Transfers of Indirect Costs	7300-7399	0.00	0.00%		0.00%	
9. Other Financing Uses						
a. Transfers Out	7600-7629	0.00	0.00%		0.00%	
b. Other Uses	7630-7699	0.00	0.00%		0.00%	
10. Other Adjustments (Explain in Section E below)						
11. Total (Sum lines B1 thru B10)		1,412,255.91	2.69%	1,450,272.00	2.67%	1,489,004.00
C. NET INCREASE(DECREASE) IN FUND BALANCE (Line A6 minus line B11)						
		74,292.12		36,275.00		(2,457.00)
D. FUND BALANCE						
1. Net Beginning Fund Balance	9791-9795	559,929.39		634,221.51		670,496.51
2. Ending Fund Balance (Sum lines C and D1)		634,221.51		670,496.51		668,039.51
3. Components of Ending Fund Balance						
a. Nonspendable	9710-9719	0.00				
b. Restricted	9740	634,221.51		670,496.51		668,039.51
c. Committed						
1. Stabilization Arrangements	9750	0.00				
2. Other Commitments	9760	0.00				
d. Assigned	9780	0.00				
e. Unassigned/Unappropriated						
1. Reserve for Economic Uncertainties	9789	0.00				
2. Unassigned/Unappropriated	9790	0.00		0.00		0.00
f. Total Components of Ending Fund Balance (Line D3f must agree with Line D2)		634,221.51		670,496.51		668,039.51
E. ASSUMPTIONS Please provide below or on a separate attachment the assumptions used to determine the projections for the first and second subsequent fiscal years.						

Description	ESTIMATED FUNDED ADA Original Budget (A)	ESTIMATED FUNDED ADA Board Approved Operating Budget (B)	ESTIMATED P-2 REPORT ADA Projected Year Totals (C)	ESTIMATED FUNDED ADA Projected Year Totals (D)	DIFFERENCE (Col. D - B) (E)	PERCENTAGE DIFFERENCE (Col. E / B) (F)
A. DISTRICT						
1. Total District Regular ADA Includes Opportunity Classes, Home & Hospital, Special Day Class, Continuation Education, Special Education NPS/LCI and Extended Year, and Community Day School (includes Necessary Small School ADA)	1,699.92	1,699.92	1,603.63	1,699.23	(.69)	0.0%
2. Total Basic Aid Choice/Court Ordered Voluntary Pupil Transfer Regular ADA Includes Opportunity Classes, Home & Hospital, Special Day Class, Continuation Education, Special Education NPS/LCI and Extended Year, and Community Day School (ADA not included in Line A1 above)	3.38	3.38	3.37	3.37	(.01)	0.0%
3. Total Basic Aid Open Enrollment Regular ADA Includes Opportunity Classes, Home & Hospital, Special Day Class, Continuation Education, Special Education NPS/LCI and Extended Year, and Community Day School (ADA not included in Line A1 above)					0.00	
4. Total, District Regular ADA (Sum of Lines A1 through A3)	1,703.30	1,703.30	1,607.00	1,702.60	(.70)	0.0%
5. District Funded County Program ADA						
a. County Community Schools	1.11	1.11	1.11	1.11	0.00	0.0%
b. Special Education-Special Day Class	4.15	4.15	4.89	4.89	.74	18.0%
c. Special Education-NPS/LCI					0.00	
d. Special Education Extended Year					0.00	
e. Other County Operated Programs: Opportunity Schools and Full Day Opportunity Classes, Specialized Secondary Schools					0.00	
f. County School Tuition Fund (Out of State Tuition) [EC 2000 and 46380]					0.00	
g. Total, District Funded County Program ADA (Sum of Lines A5a through A5f)	5.26	5.26	6.00	6.00	.74	14.0%
6. TOTAL DISTRICT ADA (Sum of Line A4 and Line A5g)	1,708.56	1,708.56	1,613.00	1,708.60	.04	0.0%
7. Adults in Correctional Facilities					0.00	
8. Charter School ADA (Enter Charter School ADA using Tab C. Charter School ADA)						

Description	ESTIMATED FUNDED ADA Original Budget (A)	ESTIMATED FUNDED ADA Board Approved Operating Budget (B)	ESTIMATED P-2 REPORT ADA Projected Year Totals (C)	ESTIMATED FUNDED ADA Projected Year Totals (D)	DIFFERENCE (Col. D - B) (E)	PERCENTAGE DIFFERENCE (Col. E / B) (F)
B. COUNTY OFFICE OF EDUCATION						
1. County Program Alternative Education Grant ADA						
a. County Group Home and Institution Pupils					0.00	
b. Juvenile Halls, Homes, and Camps					0.00	
c. Probation Referred, On Probation or Parole, Expelled per EC 48915(a) or (c) [EC 2574(c)(4)(A)]					0.00	
d. Total, County Program Alternative Education ADA (Sum of Lines B1a through B1c)	0.00	0.00	0.00	0.00	0.00	0.0%
2. District Funded County Program ADA						
a. County Community Schools					0.00	
b. Special Education-Special Day Class					0.00	
c. Special Education-NPS/LCI					0.00	
d. Special Education Extended Year					0.00	
e. Other County Operated Programs: Opportunity Schools and Full Day Opportunity Classes, Specialized Secondary Schools					0.00	
f. County School Tuition Fund (Out of State Tuition) [EC 2000 and 46380]					0.00	
g. Total, District Funded County Program ADA (Sum of Lines B2a through B2f)	0.00	0.00	0.00	0.00	0.00	0.0%
3. TOTAL COUNTY OFFICE ADA (Sum of Lines B1d and B2g)	0.00	0.00	0.00	0.00	0.00	0.0%
4. Adults in Correctional Facilities					0.00	
5. County Operations Grant ADA					0.00	
6. Charter School ADA (Enter Charter School ADA using Tab C. Charter School ADA)						

Description	ESTIMATED FUNDED ADA Original Budget (A)	ESTIMATED FUNDED ADA Board Approved Operating Budget (B)	ESTIMATED P-2 REPORT ADA Projected Year Totals (C)	ESTIMATED FUNDED ADA Projected Year Totals (D)	DIFFERENCE (Col. D - B) (E)	PERCENTAGE DIFFERENCE (Col. E / B) (F)
C. CHARTER SCHOOL ADA						
Authorizing LEAs reporting charter school SACS financial data in their Fund 01, 09, or 62 use this worksheet to report ADA for those charter schools.						
Charter schools reporting SACS financial data separately from their authorizing LEAs in Fund 01 or Fund 62 use this worksheet to report their ADA.						
FUND 01: Charter School ADA corresponding to SACS financial data reported in Fund 01.						
1. Total Charter School Regular ADA					0.00	
2. Charter School County Program Alternative Education ADA						
a. County Group Home and Institution Pupils					0.00	
b. Juvenile Halls, Homes, and Camps					0.00	
c. Probation Referred, On Probation or Parole, Expelled per EC 48915(a) or (c) [EC 2574(c)(4)(A)]					0.00	
d. Total, Charter School County Program Alternative Education ADA (Sum of Lines C2a through C2c)	0.00	0.00	0.00	0.00	0.00	0.0%
3. Charter School Funded County Program ADA						
a. County Community Schools					0.00	
b. Special Education-Special Day Class					0.00	
c. Special Education-NPS/LCI					0.00	
d. Special Education Extended Year					0.00	
e. Other County Operated Programs: Opportunity Schools and Full Day Opportunity Classes, Specialized Secondary Schools					0.00	
f. Total, Charter School Funded County Program ADA (Sum of Lines C3a through C3e)	0.00	0.00	0.00	0.00	0.00	0.0%
4. TOTAL CHARTER SCHOOL ADA (Sum of Lines C1, C2d, and C3f)	0.00	0.00	0.00	0.00	0.00	0.0%
FUND 09 or 62: Charter School ADA corresponding to SACS financial data reported in Fund 09 or Fund 62.						
5. Total Charter School Regular ADA					0.00	
6. Charter School County Program Alternative Education ADA						
a. County Group Home and Institution Pupils					0.00	
b. Juvenile Halls, Homes, and Camps					0.00	
c. Probation Referred, On Probation or Parole, Expelled per EC 48915(a) or (c) [EC 2574(c)(4)(A)]					0.00	
d. Total, Charter School County Program Alternative Education ADA (Sum of Lines C6a through C6c)	0.00	0.00	0.00	0.00	0.00	0.0%
7. Charter School Funded County Program ADA						
a. County Community Schools					0.00	
b. Special Education-Special Day Class					0.00	
c. Special Education-NPS/LCI					0.00	
d. Special Education Extended Year					0.00	
e. Other County Operated Programs: Opportunity Schools and Full Day Opportunity Classes, Specialized Secondary Schools					0.00	
f. Total, Charter School Funded County Program ADA						

Description	ESTIMATED FUNDED ADA Original Budget (A)	ESTIMATED FUNDED ADA Board Approved Operating Budget (B)	ESTIMATED P-2 REPORT ADA Projected Year Totals (C)	ESTIMATED FUNDED ADA Projected Year Totals (D)	DIFFERENCE (Col. D - B) (E)	PERCENTAGE DIFFERENCE (Col. E / B) (F)
Program ADA (Sum of Lines C7a through C7e)	0.00	0.00	0.00	0.00	0.00	0.0%
8. TOTAL CHARTER SCHOOL ADA (Sum of Lines C5, C6d, and C7f)	0.00	0.00	0.00	0.00	0.00	0.0%
9. TOTAL CHARTER SCHOOL ADA Reported in Fund 01, 09, or 62 (Sum of Lines C4 and C8)	0.00	0.00	0.00	0.00	0.00	0.0%

Description	Object	Beginning Balances (Ref. Only)	July	August	September	October	November	December	January	February
ACTUALS THROUGH THE MONTH OF (Enter Month Name):	October									
A. BEGINNING CASH			16,306,671.00	14,922,599.00	13,184,311.00	12,210,995.00	10,896,023.00	8,637,624.00	11,647,292.93	12,169,545.93
B. RECEIPTS										
LCFF/Revenue Limit Sources										
Principal Apportionment	8010-8019		709,787.00	558,243.00	1,372,007.00	1,093,135.00	910,506.00	1,372,007.00	910,506.00	910,506.00
Property Taxes	8020-8079		0.00	0.00	83,143.00	0.00	0.00	3,696,849.00	3,696,849.00	0.00
Miscellaneous Funds	8080-8099		0.00	(116,444.00)	(232,888.00)	(149,559.00)	(155,064.00)	(155,259.00)	(155,259.00)	(155,259.00)
Federal Revenue	8100-8299		76,746.00	0.00	0.00	529,495.00	0.00	254,455.93	1,529,495.00	0.00
Other State Revenue	8300-8599		51,249.00	119,318.00	220,990.00	970,518.00	8,323.00	0.00	310,568.00	970,518.00
Other Local Revenue	8600-8799		570.00	211,190.00	19,829.00	357,528.00	34,883.00	0.00	0.00	34,076.00
Interfund Transfers In	8910-8929									
All Other Financing Sources	8930-8979									
TOTAL RECEIPTS			838,352.00	772,307.00	1,463,081.00	2,801,117.00	798,648.00	5,168,052.93	6,292,159.00	1,759,841.00
C. DISBURSEMENTS										
Certificated Salaries	1000-1999		139,401.00	1,041,122.00	1,025,372.00	1,339,997.00	1,157,956.00		2,315,912.00	1,157,956.00
Classified Salaries	2000-2999		288,056.00	396,566.00	380,132.00	398,777.00	531,734.00		861,358.00	430,679.00
Employee Benefits	3000-3999		328,702.00	535,409.00	523,419.00	628,288.00	639,448.00	594,352.00	1,278,896.00	639,448.00
Books and Supplies	4000-4999		1,589.00	98,145.00	76,833.00	129,470.00	155,221.00	645,754.00	645,754.00	645,754.00
Services	5000-5999		53,348.00	420,835.00	478,639.00	718,095.00	528,548.00	528,548.00	528,548.00	528,548.00
Capital Outlay	6000-6599		13,108.00	29,844.00	18,135.00	386,484.00	136,192.00	386,484.00	136,192.00	136,192.00
Other Outgo	7000-7499		3,470.00	3,470.00	6,246.00	6,246.00	0.00	3,246.00	3,246.00	3,246.00
Interfund Transfers Out	7600-7629									

Description	Object	Beginning Balances (Ref. Only)	July	August	September	October	November	December	January	February
All Other Financing Uses	7630-7699									
TOTAL DISBURSEMENTS			827,674.00	2,525,391.00	2,508,776.00	3,607,357.00	3,149,099.00	2,158,384.00	5,769,906.00	3,541,823.00
D. BALANCE SHEET ITEMS										
<u>Assets and Deferred Outflows</u>										
Cash Not In Treasury	9111-9199									
Accounts Receivable	9200-9299			90,769.00	(1,274.00)	867,814.00				
Due From Other Funds	9310						9,519.00			
Stores	9320									
Prepaid Expenditures	9330									
Other Current Assets	9340									
Lease Receivable	9380									
Deferred Outflows of Resources	9490									
SUBTOTAL		0.00	0.00	90,769.00	(1,274.00)	867,814.00	9,519.00	0.00	0.00	0.00
<u>Liabilities and Deferred Inflows</u>										
Accounts Payable	9500-9599		1,394,750.00	75,973.00	(73,653.00)	498,422.00	(82,533.00)			
Due To Other Funds	9610									
Current Loans	9640									
Unearned Revenues	9650					878,124.00				
Deferred Inflows of Resources	9690									
SUBTOTAL		0.00	1,394,750.00	75,973.00	(73,653.00)	1,376,546.00	(82,533.00)	0.00	0.00	0.00
<u>Nonoperating</u>										
Suspense Clearing	9910									
TOTAL BALANCE SHEET ITEMS		0.00	(1,394,750.00)	14,796.00	72,379.00	(508,732.00)	92,052.00	0.00	0.00	0.00
E. NET INCREASE/DECREASE (B - C + D)			(1,384,072.00)	(1,738,288.00)	(973,316.00)	(1,314,972.00)	(2,258,399.00)	3,009,668.93	522,253.00	(1,781,982.00)
F. ENDING CASH (A + E)			14,922,599.00	13,184,311.00	12,210,995.00	10,896,023.00	8,637,624.00	11,647,292.93	12,169,545.93	10,387,563.93
G. ENDING CASH, PLUS CASH ACCRUALS AND ADJUSTMENTS										

Description	Object	March	April	May	June	Accruals	Adjustments	TOTAL	BUDGET
ACTUALS THROUGH THE MONTH OF (Enter Month Name):		October							
A. BEGINNING CASH		10,387,563.93	7,531,346.93	10,260,032.25	12,210,630.86				
B. RECEIPTS									
LCFF/Revenue Limit Sources									
Principal Apportionment	8010-8019	910,506.00	910,506.00	910,506.00	910,510.00	384,000.00		11,862,725.00	11,862,725.00
Property Taxes	8020-8079	0.00	3,696,849.00	3,696,850.00	0.00	0.00		14,870,540.00	14,870,540.00
Miscellaneous Funds	8080-8099	(224,900.00)	(224,900.00)	(224,900.00)	(224,903.00)			(2,019,335.00)	(2,019,335.00)
Federal Revenue	8100-8299	0.00	1,529,495.00	0.00	0.00	380,000.00		4,299,686.93	4,299,686.93
Other State Revenue	8300-8599	0.00	0.00	970,518.61	0.00	70,000.00		3,692,002.61	3,692,002.61
Other Local Revenue	8600-8799	0.00	357,528.32	0.00	0.00	157,000.00		1,172,604.32	1,172,604.32
Interfund Transfers In	8910-8929							0.00	0.00
All Other Financing Sources	8930-8979							0.00	0.00
TOTAL RECEIPTS		685,606.00	6,269,478.32	5,352,974.61	685,607.00	991,000.00	0.00	33,878,223.86	33,878,223.86
C. DISBURSEMENTS									
Certificated Salaries	1000-1999	1,157,956.00	1,157,956.00	1,157,956.00	841,065.04	0.00		12,492,649.04	12,492,649.04
Classified Salaries	2000-2999	430,679.00	430,679.00	430,679.00	336,023.44			4,915,362.44	4,915,362.44
Employee Benefits	3000-3999	639,448.00	639,448.00	639,448.00	594,353.87			7,680,659.87	7,680,659.87
Books and Supplies	4000-4999	645,754.00	645,754.00	645,745.00	645,792.22			4,981,565.22	4,981,565.22
Services	5000-5999	528,548.00	528,548.00	528,548.00	805,380.71			6,176,133.71	6,176,133.71
Capital Outlay	6000-6599	136,192.00	136,192.00		117,854.05			1,632,869.05	1,632,869.05
Other Outgo	7000-7499	3,246.00	2,216.00	0.00	246.00			34,878.00	34,878.00
Interfund Transfers Out	7600-7629							0.00	0.00
All Other Financing Uses	7630-7699							0.00	0.00

Description	Object	March	April	May	June	Accruals	Adjustments	TOTAL	BUDGET
TOTAL DISBURSEMENTS		3,541,823.00	3,540,793.00	3,402,376.00	3,340,715.33	0.00	0.00	37,914,117.33	37,914,117.33
D. BALANCE SHEET ITEMS									
<u>Assets and Deferred Outflows</u>									
Cash Not In Treasury	9111-9199							0.00	
Accounts Receivable	9200-9299					750,000.00		1,707,309.00	
Due From Other Funds	9310							9,519.00	
Stores	9320							0.00	
Prepaid Expenditures	9330							0.00	
Other Current Assets	9340							0.00	
Lease Receivable	9380							0.00	
Deferred Outflows of Resources	9490							0.00	
SUBTOTAL		0.00	0.00	0.00	0.00	750,000.00	0.00	1,716,828.00	
<u>Liabilities and Deferred Inflows</u>									
Accounts Payable	9500-9599					435,000.00		2,247,959.00	
Due To Other Funds	9610							0.00	
Current Loans	9640							0.00	
Unearned Revenues	9650					480,000.00		1,358,124.00	
Deferred Inflows of Resources	9690							0.00	
SUBTOTAL		0.00	0.00	0.00	0.00	915,000.00	0.00	3,606,083.00	
<u>Nonoperating</u>									
Suspense Clearing	9910							0.00	
TOTAL BALANCE SHEET ITEMS		0.00	0.00	0.00	0.00	(165,000.00)	0.00	(1,889,255.00)	
E. NET INCREASE/DECREASE (B - C + D)		(2,856,217.00)	2,728,685.32	1,950,598.61	(2,655,108.33)	826,000.00	0.00	(5,925,148.47)	(4,035,893.47)
F. ENDING CASH (A + E)		7,531,346.93	10,260,032.25	12,210,630.86	9,555,522.53				
G. ENDING CASH, PLUS CASH ACCRUALS AND ADJUSTMENTS								10,381,522.53	

Description	Object	Beginning Balances (Ref. Only)	July	August	September	October	November	December	January	February
ACTUALS THROUGH THE MONTH OF (Enter Month Name):										
A. BEGINNING CASH			9,555,522.53	9,555,522.53	9,555,522.53	9,555,522.53	9,555,522.53	9,555,522.53	9,555,522.53	9,555,522.53
B. RECEIPTS										
LCFF/Revenue Limit Sources										
Principal Apportionment	8010-8019									
Property Taxes	8020-8079									
Miscellaneous Funds	8080-8099									
Federal Revenue	8100-8299									
Other State Revenue	8300-8599									
Other Local Revenue	8600-8799									
Interfund Transfers In	8910-8929									
All Other Financing Sources	8930-8979									
TOTAL RECEIPTS			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
C. DISBURSEMENTS										
Certificated Salaries	1000-1999									
Classified Salaries	2000-2999									
Employee Benefits	3000-3999									
Books and Supplies	4000-4999									
Services	5000-5999									
Capital Outlay	6000-6599									
Other Outgo	7000-7499									
Interfund Transfers Out	7600-7629									

Description	Object	Beginning Balances (Ref. Only)	July	August	September	October	November	December	January	February
All Other Financing Uses	7630-7699									
TOTAL DISBURSEMENTS			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
D. BALANCE SHEET ITEMS										
<u>Assets and Deferred Outflows</u>										
Cash Not In Treasury	9111-9199									
Accounts Receivable	9200-9299									
Due From Other Funds	9310									
Stores	9320									
Prepaid Expenditures	9330									
Other Current Assets	9340									
Lease Receivable	9380									
Deferred Outflows of Resources	9490									
SUBTOTAL		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<u>Liabilities and Deferred Inflows</u>										
Accounts Payable	9500-9599									
Due To Other Funds	9610									
Current Loans	9640									
Unearned Revenues	9650									
Deferred Inflows of Resources	9690									
SUBTOTAL		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<u>Nonoperating</u>										
Suspense Clearing	9910									
TOTAL BALANCE SHEET ITEMS		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
E. NET INCREASE/DECREASE (B - C + D)			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
F. ENDING CASH (A + E)			9,555,522.53	9,555,522.53	9,555,522.53	9,555,522.53	9,555,522.53	9,555,522.53	9,555,522.53	9,555,522.53
G. ENDING CASH, PLUS CASH ACCRUALS AND ADJUSTMENTS										

Description	Object	March	April	May	June	Accruals	Adjustments	TOTAL	BUDGET
ACTUALS THROUGH THE MONTH OF (Enter Month Name):									
A. BEGINNING CASH		9,555,522.53	9,555,522.53	9,555,522.53	9,555,522.53				
B. RECEIPTS									
LCFF/Revenue Limit Sources									
Principal Apportionment	8010-8019							0.00	
Property Taxes	8020-8079							0.00	
Miscellaneous Funds	8080-8099							0.00	
Federal Revenue	8100-8299							0.00	
Other State Revenue	8300-8599							0.00	
Other Local Revenue	8600-8799							0.00	
Interfund Transfers In	8910-8929							0.00	
All Other Financing Sources	8930-8979							0.00	
TOTAL RECEIPTS		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
C. DISBURSEMENTS									
Certificated Salaries	1000-1999							0.00	
Classified Salaries	2000-2999							0.00	
Employee Benefits	3000-3999							0.00	
Books and Supplies	4000-4999							0.00	
Services	5000-5999							0.00	
Capital Outlay	6000-6599							0.00	
Other Outgo	7000-7499							0.00	
Interfund Transfers Out	7600-7629							0.00	
All Other Financing Uses	7630-7699							0.00	

Description	Object	March	April	May	June	Accruals	Adjustments	TOTAL	BUDGET
TOTAL DISBURSEMENTS		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
D. BALANCE SHEET ITEMS									
<u>Assets and Deferred Outflows</u>									
Cash Not In Treasury	9111-9199							0.00	
Accounts Receivable	9200-9299							0.00	
Due From Other Funds	9310							0.00	
Stores	9320							0.00	
Prepaid Expenditures	9330							0.00	
Other Current Assets	9340							0.00	
Lease Receivable	9380							0.00	
Deferred Outflows of Resources	9490							0.00	
SUBTOTAL		0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<u>Liabilities and Deferred Inflows</u>									
Accounts Payable	9500-9599							0.00	
Due To Other Funds	9610							0.00	
Current Loans	9640							0.00	
Unearned Revenues	9650							0.00	
Deferred Inflows of Resources	9690							0.00	
SUBTOTAL		0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<u>Nonoperating</u>									
Suspense Clearing	9910							0.00	
TOTAL BALANCE SHEET ITEMS		0.00	0.00	0.00	0.00	0.00	0.00	0.00	
E. NET INCREASE/DECREASE (B - C + D)		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
F. ENDING CASH (A + E)		9,555,522.53	9,555,522.53	9,555,522.53	9,555,522.53				
G. ENDING CASH, PLUS CASH ACCRUALS AND ADJUSTMENTS								9,555,522.53	

Provide methodology and assumptions used to estimate ADA, enrollment, revenues, expenditures, reserves and fund balance, and multiyear commitments (including cost-of-living adjustments).

Deviations from the standards must be explained and may affect the interim certification.

CRITERIA AND STANDARDS

1. CRITERION: Average Daily Attendance

STANDARD: Funded average daily attendance (ADA) for any of the current fiscal year or two subsequent fiscal years has not changed by more than two percent since budget adoption.

District's ADA Standard Percentage Range: -2.0% to +2.0%

1A. Calculating the District's ADA Variances

DATA ENTRY: Budget Adoption data that exist for the current year will be extracted; otherwise, enter data into the first column for all fiscal years. First Interim Projected Year Totals data that exist for the current year will be extracted; otherwise, enter data for all fiscal years. Enter district regular ADA and charter school ADA corresponding to financial data reported in the General Fund, only, for all fiscal years.

Estimated Funded ADA

Fiscal Year		Budget Adoption	First Interim	Percent Change	Status
		Budget (Form 01CS, Item 1A)	Projected Year Totals (Form AI, Lines A4 and C4)		
Current Year (2023-24)	District Regular	1,703.30	1,702.60	0.0%	Met
	Charter School	0.00	0.00		
	Total ADA	1,703.30	1,702.60		
1st Subsequent Year (2024-25)	District Regular	1,627.19	1,629.37	.1%	Met
	Charter School				
	Total ADA	1,627.19	1,629.37		
2nd Subsequent Year (2025-26)	District Regular	1,615.27	1,621.37	.4%	Met
	Charter School				
	Total ADA	1,615.27	1,621.37		

1B. Comparison of District ADA to the Standard

DATA ENTRY: Enter an explanation if the standard is not met.

1a. STANDARD MET - Funded ADA has not changed since budget adoption by more than two percent in any of the current year or two subsequent fiscal years.

Explanation:
(required if NOT met)

2. **CRITERION: Enrollment**

STANDARD: Projected enrollment for any of the current fiscal year or two subsequent fiscal years has not changed by more than two percent since budget adoption

District's Enrollment Standard Percentage Range: -2.0% to +2.0%

2A. Calculating the District's Enrollment Variances

DATA ENTRY: Budget Adoption data that exist will be extracted; otherwise, enter data into the first column for all fiscal years. Enter data in the second column for all fiscal years. Enter district regular enrollment and charter school enrollment corresponding to financial data reported in the General Fund, only, for all fiscal years.

Fiscal Year	Enrollment		Percent Change	Status
	Budget Adoption (Form 01CS, Item 3B)	First Interim CBEDS/Projected		
Current Year (2023-24)				
District Regular	1,762.00	1,759.00		
Charter School				
Total Enrollment	1,762.00	1,759.00	(.2%)	Met
1st Subsequent Year (2024-25)				
District Regular	1,742.00	1,759.00		
Charter School				
Total Enrollment	1,742.00	1,759.00	1.0%	Met
2nd Subsequent Year (2025-26)				
District Regular	1,722.00	1,759.00		
Charter School				
Total Enrollment	1,722.00	1,759.00	2.1%	Not Met

2B. Comparison of District Enrollment to the Standard

DATA ENTRY: Enter an explanation if the standard is not met.

- 1a. **STANDARD NOT MET** - Enrollment projections have changed since budget adoption by more than two percent in any of the current year or two subsequent fiscal years. Provide reasons why the change(s) exceed the standard, a description of the methods and assumptions used in projecting enrollment, and what changes will be made to improve the accuracy of projections in this area.

Explanation:
(required if NOT met)

The district is expecting housing development and may impact enrollment in 2025-26.

3. CRITERION: ADA to Enrollment

STANDARD: Projected second period (P-2) average daily attendance (ADA) to enrollment ratio for any of the current fiscal year or two subsequent fiscal years has not increased from the historical average ratio from the three prior fiscal years by more than one half of one percent (0.5%).

3A. Calculating the District's ADA to Enrollment Standard

DATA ENTRY: Unaudited Actuals data that exist will be extracted into the P-2 ADA column for the First Prior Year; otherwise, enter First Prior Year data. P-2 ADA for the second and third prior years are preloaded. Budget Adoption data that exist will be extracted into the Enrollment column; otherwise, enter Enrollment data for all fiscal years. Data should reflect district regular and charter school ADA/enrollment corresponding to financial data reported in the General Fund, only, for all fiscal years.

Fiscal Year	P-2 ADA	Enrollment	Historical Ratio of ADA to Enrollment
	Unaudited Actuals (Form A, Lines A4 and C4)	CBEDS Actual (Form 01CS, Item 2A)	
Third Prior Year (2020-21)			
District Regular	1,864	2,279	
Charter School			
Total ADA/Enrollment	1,864	2,279	81.8%
Second Prior Year (2021-22)			
District Regular	1,664	2,241	
Charter School			
Total ADA/Enrollment	1,664	2,241	74.3%
First Prior Year (2022-23)			
District Regular	1,603	1,786	
Charter School			
Total ADA/Enrollment	1,603	1,786	89.8%
Historical Average Ratio:			81.9%
District's ADA to Enrollment Standard (historical average ratio plus 0.5%):			82.4%

3B. Calculating the District's Projected Ratio of ADA to Enrollment

DATA ENTRY: Estimated P-2 ADA will be extracted into the first column for the Current Year; enter data in the first column for the subsequent fiscal years. Data should reflect district regular and charter school ADA/enrollment corresponding to financial data reported in the General Fund, only, for all fiscal years. All other data are extracted.

Fiscal Year	Estimated P-2 ADA	Enrollment	Ratio of ADA to Enrollment	Status
	(Form AI, Lines A4 and C4)	CBEDS/Projected (Criterion 2, Item 2A)		
Current Year (2023-24)				
District Regular	1,607	1,759		
Charter School	0			
Total ADA/Enrollment	1,607	1,759	91.4%	Not Met
1st Subsequent Year (2024-25)				
District Regular	1,613	1,759		
Charter School				
Total ADA/Enrollment	1,613	1,759	91.7%	Not Met
2nd Subsequent Year (2025-26)				
District Regular	1,613	1,759		
Charter School				
Total ADA/Enrollment	1,613	1,759	91.7%	Not Met

3C. Comparison of District ADA to Enrollment Ratio to the Standard

DATA ENTRY: Enter an explanation if the standard is not met.

- 1a. STANDARD NOT MET - Projected P-2 ADA to enrollment ratio exceeds the standard in any of the current year or two subsequent fiscal years. Provide reasons why the projected ratio exceeds the district's historical average ratio by more than 0.5%.

Explanation:
(required if NOT met)

The district has implemented programs to have an average of 92% ADA.

4. CRITERION: LCFF Revenue

STANDARD: Projected LCFF revenue for any of the current fiscal year or two subsequent fiscal years has not changed by more than two percent since budget adoption.

District's LCFF Revenue Standard Percentage Range: -2.0% to +2.0%

4A. Calculating the District's Projected Change in LCFF Revenue

DATA ENTRY: Budget Adoption data that exist will be extracted; otherwise, enter data into the first column. In the First Interim column, Current Year data are extracted; enter data for the two subsequent years.

Fiscal Year	LCFF Revenue (Fund 01, Objects 8011, 8012, 8020-8089)		Percent Change	Status
	Budget Adoption	First Interim		
	(Form 01CS, Item 4B)	Projected Year Totals		
Current Year (2023-24)	25,678,779.00	26,575,851.00	3.5%	Not Met
1st Subsequent Year (2024-25)	23,206,397.00	25,043,711.00	7.9%	Not Met
2nd Subsequent Year (2025-26)	23,284,450.00	26,181,610.00	12.4%	Not Met

4B. Comparison of District LCFF Revenue to the Standard

DATA ENTRY: Enter an explanation if the standard is not met.

- 1a. STANDARD NOT MET - Projected LCFF revenue has changed since budget adoption by more than two percent in any of the current year or two subsequent fiscal years. Provide reasons why the change(s) exceed the standard and a description of the methods and assumptions used in projecting LCFF revenue.

Explanation:
(required if NOT met)

Budget adoption the district took a more conservative approach to LCFF estimations and at 1st interim the estimations are more reflective of expectations. One piece is increase in property tax revenues.

5. CRITERION: Salaries and Benefits

STANDARD: Projected ratio of total unrestricted salaries and benefits to total unrestricted general fund expenditures for any of the current fiscal year or two subsequent fiscal years has not changed from the historical average ratio from the three prior fiscal years by more than the greater of three percent or the district's required reserves percentage.

5A. Calculating the District's Historical Average Ratio of Unrestricted Salaries and Benefits to Total Unrestricted General Fund Expenditures

DATA ENTRY: Unaudited Actuals data that exist for the First Prior Year will be extracted; otherwise, enter data for the First Prior Year. Unaudited Actuals data for the second and third prior years are preloaded.

Fiscal Year	Unaudited Actuals - Unrestricted (Resources 0000-1999)		Ratio of Unrestricted Salaries and Benefits to Total Unrestricted Expenditures
	Salaries and Benefits (Form 01, Objects 1000- 3999)	Total Expenditures (Form 01, Objects 1000- 7499)	
	Third Prior Year (2020-21)	13,017,901.28	
Second Prior Year (2021-22)	13,012,920.11	15,722,117.58	82.8%
First Prior Year (2022-23)	15,023,761.00	18,680,042.00	80.4%
	Historical Average Ratio:		82.1%

	Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
District's Reserve Standard Percentage (Criterion 10B, Line 4)	3%	3%	3%
District's Salaries and Benefits Standard (historical average ratio, plus/minus the greater of 3% or the district's reserve standard percentage):	79.1% to 85.1%	79.1% to 85.1%	79.1% to 85.1%

5B. Calculating the District's Projected Ratio of Unrestricted Salaries and Benefits to Total Unrestricted General Fund Expenditures

DATA ENTRY: If Form MYPI exists, Projected Year Totals data for the two subsequent years will be extracted; if not, enter Projected Year Totals data. Projected Year Totals data for Current Year are extracted.

Fiscal Year	Projected Year Totals - Unrestricted (Resources 0000-1999)		Ratio of Unrestricted Salaries and Benefits to Total Unrestricted Expenditures	Status
	Salaries and Benefits (Form 011, Objects 1000- 3999)	Total Expenditures (Form 011, Objects 1000- 7499)		
	Current Year (2023-24)	17,742,102.91		
1st Subsequent Year (2024-25)	18,173,445.57	21,828,379.57	83.3%	Met
2nd Subsequent Year (2025-26)	18,616,720.57	22,271,654.57	83.6%	Met

5C. Comparison of District Salaries and Benefits Ratio to the Standard

DATA ENTRY: Enter an explanation if the standard is not met.

1a. STANDARD MET - Ratio of total unrestricted salaries and benefits to total unrestricted expenditures has met the standard for the current year and two subsequent fiscal years.

Explanation:
(required if NOT met)

6. CRITERION: Other Revenues and Expenditures

STANDARD: Projected operating revenues (including federal, other state and other local) or expenditures (including books and supplies, and services and other operating), for any of the current fiscal year or two subsequent fiscal years, have not changed by more than five percent since budget adoption. Changes that exceed five percent in any major object category must be explained.

District's Other Revenues and Expenditures Standard Percentage Range:	-5.0% to +5.0%
District's Other Revenues and Expenditures Explanation Percentage Range:	-5.0% to +5.0%

6A. Calculating the District's Change by Major Object Category and Comparison to the Explanation Percentage Range

DATA ENTRY: Budget Adoption data that exist will be extracted; otherwise, enter data into the first column. First Interim data for the Current Year are extracted. If First Interim Form MYPI exists, data for the two subsequent years will be extracted; if not, enter data for the two subsequent years into the second column. Explanations must be entered for each category if the percent change for any year exceeds the district's explanation percentage range.

Object Range / Fiscal Year	Budget Adoption	First Interim	Percent Change	Change Is Outside Explanation Range
	Budget (Form 01CS, Item 6B)	Projected Year Totals (Fund 01) (Form MYPI)		

Federal Revenue (Fund 01, Objects 8100-8299) (Form MYPI, Line A2)

Current Year (2023-24)	4,464,003.04	4,299,686.93	-3.7%	No
1st Subsequent Year (2024-25)	1,660,564.00	1,660,564.00	0.0%	No
2nd Subsequent Year (2025-26)	1,715,196.00	1,715,196.00	0.0%	No

Explanation:
(required if Yes)

Other State Revenue (Fund 01, Objects 8300-8599) (Form MYPI, Line A3)

Current Year (2023-24)	3,133,114.57	3,692,002.61	17.8%	Yes
1st Subsequent Year (2024-25)	3,241,650.00	3,241,650.00	0.0%	No
2nd Subsequent Year (2025-26)	3,335,853.00	3,335,853.00	0.0%	No

Explanation:
(required if Yes)

increase in mental health revenue, STRS on behalf, and increase of employees participating in classified summer program.

Other Local Revenue (Fund 01, Objects 8600-8799) (Form MYPI, Line A4)

Current Year (2023-24)	1,163,272.66	1,172,604.32	.8%	No
1st Subsequent Year (2024-25)	1,163,272.00	265,313.00	-77.2%	Yes
2nd Subsequent Year (2025-26)	1,163,272.00	265,313.00	-77.2%	Yes

Explanation:
(required if Yes)

COVID one-time funding has only been projected for 2023-24 as it is ending as of 9/30/2024.

Books and Supplies (Fund 01, Objects 4000-4999) (Form MYPI, Line B4)

Current Year (2023-24)	5,306,366.34	4,981,565.22	-6.1%	Yes
1st Subsequent Year (2024-25)	3,073,555.00	3,150,000.00	2.5%	No
2nd Subsequent Year (2025-26)	2,088,697.00	1,150,000.00	-44.9%	Yes

Explanation:
(required if Yes)

COVID one-time funds expire on 9/30/24. The district needs to be conservative in MYP to maintain positive ending balance.

Services and Other Operating Expenditures (Fund 01, Objects 5000-5999) (Form MYPI, Line B5)

Current Year (2023-24)	5,174,719.12	6,176,133.71	19.4%	Yes
1st Subsequent Year (2024-25)	5,330,994.00	4,861,472.00	-8.8%	Yes
2nd Subsequent Year (2025-26)	5,471,732.00	4,915,895.00	-10.2%	Yes

Explanation:
(required if Yes)

COVID one-time funding is going away as of 9/30/24. The district will need to be conservative in expenditures in MYP to maintain a positive ending balance.

6B. Calculating the District's Change in Total Operating Revenues and Expenditures

DATA ENTRY: All data are extracted or calculated.

Object Range / Fiscal Year	Budget Adoption	First Interim	Percent Change	Status
	Budget	Projected Year Totals		
Total Federal, Other State, and Other Local Revenue (Section 6A)				
Current Year (2023-24)	8,760,390.27	9,164,293.86	4.6%	Met
1st Subsequent Year (2024-25)	6,065,486.00	5,167,527.00	-14.8%	Not Met
2nd Subsequent Year (2025-26)	6,214,321.00	5,316,362.00	-14.4%	Not Met
Total Books and Supplies, and Services and Other Operating Expenditures (Section 6A)				
Current Year (2023-24)	10,481,085.46	11,157,698.93	6.5%	Not Met
1st Subsequent Year (2024-25)	8,404,549.00	8,011,472.00	-4.7%	Met
2nd Subsequent Year (2025-26)	7,560,429.00	6,065,895.00	-19.8%	Not Met

6C. Comparison of District Total Operating Revenues and Expenditures to the Standard Percentage Range

DATA ENTRY: Explanations are linked from Section 6A if the status in Section 6B is Not Met; no entry is allowed below.

- 1a. STANDARD NOT MET - One or more projected operating revenue have changed since budget adoption by more than the standard in one or more of the current year or two subsequent fiscal years. Reasons for the projected change, descriptions of the methods and assumptions used in the projections, and what changes, if any, will be made to bring the projected operating revenues within the standard must be entered in Section 6A above and will also display in the explanation box below.

Explanation:

Federal Revenue
(linked from 6A
if NOT met)

Explanation:

Other State Revenue
(linked from 6A
if NOT met)

increase in mental health revenue, STRS on behalf, and increase of employees participating in classified summer program.

Explanation:

Other Local Revenue
(linked from 6A
if NOT met)

COVID one-time funding has only been projected for 2023-24 as it is ending as of 9/30/2024.

- 1b. STANDARD NOT MET - One or more total operating expenditures have changed since budget adoption by more than the standard in one or more of the current year or two subsequent fiscal years. Reasons for the projected change, descriptions of the methods and assumptions used in the projections, and what changes, if any, will be made to bring the projected operating revenues within the standard must be entered in Section 6A above and will also display in the explanation box below.

Explanation:

Books and Supplies
(linked from 6A
if NOT met)

COVID one-time funds expire on 9/30/24. The district needs to be conservative in MYP to maintain positive ending balance.

Explanation:

Services and Other Exps
(linked from 6A
if NOT met)

COVID one-time funding is going away as of 9/30/24. The district will need to be conservative in expenditures in MYP to maintain a positive ending balance.

7. **CRITERION: Facilities Maintenance**

STANDARD: Identify changes that have occurred since budget adoption in the projected contributions for facilities maintenance funding as required pursuant to Education Code Section 17070.75, or in how the district is providing adequately to preserve the functionality of its facilities for their normal life in accordance with Education Code sections 52060(d)(1) and 17002(d)(1).

Determining the District's Compliance with the Contribution Requirement for EC Section 17070.75 - Ongoing and Major Maintenance/Restricted Maintenance Account (OMMA/RMA)

NOTE: EC Section 17070.75 requires the district to deposit into the account a minimum amount equal to or greater than three percent of the total general fund expenditures and other financing uses for that fiscal year. Statute exclude the following resource codes from the total general fund expenditures calculation: 3212, 3213, 3214, 3216, 3218, 3219, 3225, 3226, 3227, 3228, 5316, 5632, 5633, 5634, 7027, and 7690.

DATA ENTRY: Enter the Required Minimum Contribution if Budget data does not exist. Budget data that exist will be extracted; otherwise, enter budget data into lines 1, if applicable, and 2. All other data are extracted.

	Required Minimum Contribution	First Interim Contribution	Status
		Projected Year Totals (Fund 01, Resource 8150, Objects 8900-8999)	
1. OMMA/RMA Contribution	984,348.56	999,274.76	Met
2. Budget Adoption Contribution (information only) (Form 01CS, Criterion 7)		999,274.76	

If status is not met, enter an X in the box that best describes why the minimum required contribution was not made:

- Not applicable (district does not participate in the Leroy F. Greene School Facilities Act of 1998)
- Exempt (due to district's small size [EC Section 17070.75 (b)(2)(E)])
- Other (explanation must be provided)

Explanation:
(required if NOT met
and Other is marked)

8. CRITERION: Deficit Spending

STANDARD: Unrestricted deficit spending (total unrestricted expenditures and other financing uses is greater than total unrestricted revenues and other financing sources) as a percentage of total unrestricted expenditures and other financing uses, has not exceeded one-third of the district's available reserves¹ as a percentage of total expenditures and other financing uses² in any of the current fiscal year or two subsequent fiscal years.

¹Available reserves are the unrestricted amounts in the Stabilization Arrangements, Reserve for Economic Uncertainties, and Unassigned/Unappropriated accounts in the General Fund and the Special Reserve Fund for Other Than Capital Outlay Projects. Available reserves will be reduced by any negative ending balances in restricted resources in the General Fund.

²A school district that is the Administrative Unit of a Special Education Local Plan Area (SELPA) may exclude from its expenditures the distribution of funds to its participating members.

8A. Calculating the District's Deficit Spending Standard Percentage Levels

DATA ENTRY: All data are extracted or calculated.

	Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
District's Available Reserve Percentages (Criterion 10C, Line 9)	19.9%	18.5%	17.1%
District's Deficit Spending Standard Percentage Levels (one-third of available reserve percentage):	6.6%	6.2%	5.7%

8B. Calculating the District's Deficit Spending Percentages

DATA ENTRY: Current Year data are extracted. If Form MYPI exists, data for the two subsequent years will be extracted; if not, enter data for the two subsequent years into the first and second columns.

Fiscal Year	Projected Year Totals			Status
	Net Change in Unrestricted Fund Balance (Form 011, Section E) (Form MYPI, Line C)	Total Unrestricted Expenditures and Other Financing Uses (Form 011, Objects 1000- 7999) (Form MYPI, Line B11)	Deficit Spending Level (If Net Change in Unrestricted Fund Balance is negative, else N/A)	
Current Year (2023-24)	(1,795,290.07)	22,098,494.70	8.1%	Not Met
1st Subsequent Year (2024-25)	(1,195,394.57)	21,828,379.57	5.5%	Met
2nd Subsequent Year (2025-26)	(720,040.78)	22,271,654.57	3.2%	Met

8C. Comparison of District Deficit Spending to the Standard

DATA ENTRY: Enter an explanation if the standard is not met.

- 1a. STANDARD NOT MET - Unrestricted deficit spending has exceeded the standard percentage level in any of the current year or two subsequent fiscal years. Provide reasons for the deficit spending, a description of the methods and assumptions used in balancing the unrestricted budget, and what changes will be made to ensure that the budget deficits are eliminated or are balanced within the standard.

Explanation:
(required if NOT met)

Increase in salaries to all employees of 8% for 2023-24.

9. CRITERION: Fund and Cash Balances

A. FUND BALANCE STANDARD: Projected general fund balance will be positive at the end of the current fiscal year and two subsequent fiscal years.

9A-1. Determining if the District's General Fund Ending Balance is Positive

DATA ENTRY: Current Year data are extracted. If Form MYPI exists, data for the two subsequent years will be extracted; if not, enter data for the two subsequent years.

Fiscal Year	Ending Fund Balance General Fund Projected Year Totals (Form 011, Line F2) (Form MYPI, Line D2)	Status
Current Year (2023-24)	11,062,079.19	Met
1st Subsequent Year (2024-25)	7,039,248.71	Met
2nd Subsequent Year (2025-26)	5,633,246.23	Met

9A-2. Comparison of the District's Ending Fund Balance to the Standard

DATA ENTRY: Enter an explanation if the standard is not met.

1a. STANDARD MET - Projected general fund ending balance is positive for the current fiscal year and two subsequent fiscal years.

Explanation:
(required if NOT met)

B. CASH BALANCE STANDARD: Projected general fund cash balance will be positive at the end of the current fiscal year.

9B-1. Determining if the District's Ending Cash Balance is Positive

DATA ENTRY: If Form CASH exists, data will be extracted; if not, data must be entered below.

Fiscal Year	Ending Cash Balance General Fund (Form CASH, Line F, June Column)	Status
Current Year (2023-24)	9,555,522.53	Met

9B-2. Comparison of the District's Ending Cash Balance to the Standard

DATA ENTRY: Enter an explanation if the standard is not met.

1a. STANDARD MET - Projected general fund cash balance will be positive at the end of the current fiscal year.

Explanation:
(required if NOT met)

10. CRITERION: Reserves

STANDARD: Available reserves¹ for any of the current fiscal year or two subsequent fiscal years are not less than the following percentages or amounts² as applied to total expenditures and other financing uses³:

DATA ENTRY: Current Year data are extracted. If Form MYPI exists, 1st and 2nd Subsequent Year data will be extracted. If not, enter district regular ADA and charter school ADA corresponding to financial data reported in the General Fund, only, for the two subsequent years.

Percentage Level		District ADA
5% or \$80,000 (greater of)	0	to 300
4% or \$80,000 (greater of)	301	to 1,000
3%	1,001	to 30,000
2%	30,001	to 400,000
1%	400,001	and over

¹ Available reserves are the unrestricted amounts in the Stabilization Arrangements, Reserve for Economic Uncertainties, and Unassigned/Unappropriated accounts in the General Fund and Special Reserve Fund for Other Than Capital Outlay Projects. Available reserves will be reduced by any negative ending balances in restricted resources in the General Fund.

² Dollar amounts to be adjusted annually by the prior year statutory cost-of-living adjustment (Education Code Section 42238), rounded to the nearest thousand.

³ A school district that is the Administrative Unit (AU) of a Special Education Local Plan Area (SELPA) may exclude from its expenditures the distribution of funds to its participating members.

	Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
District Estimated P-2 ADA (Current Year, Form AI, Lines A4 and C4. Subsequent Years, Form MYPI, Line F2, if available.)	1,607.00	1,629.37	1,621.37
District's Reserve Standard Percentage Level:	3%	3%	3%

10A. Calculating the District's Special Education Pass-through Exclusions (only for districts that serve as the AU of a SELPA)

DATA ENTRY: For SELPA AUs, if Form MYPI exists, all data will be extracted including the Yes/No button selection. If not, click the appropriate Yes or No button for item 1 and, if Yes, enter data for item 2a and for the two subsequent years in item 2b; Current Year data are extracted.

For districts that serve as the AU of a SELPA (Form MYPI, Lines F1a, F1b1, and F1b2):

- Do you choose to exclude from the reserve calculation the pass-through funds distributed to SELPA members?
- If you are the SELPA AU and are excluding special education pass-through funds:
 - Enter the name(s) of the SELPA(s):

Yes

b. Special Education Pass-through Funds
(Fund 10, resources 3300-3499, 6500-6540 and 6546, objects 7211-7213 and 7221-7223)

Current Year Projected Year Totals (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
0.00		

10B. Calculating the District's Reserve Standard

DATA ENTRY: If Form MYPI exists, all data will be extracted or calculated. If not, enter data for line 1 for the two subsequent years; Current Year data are extracted.

	Current Year Projected Year Totals (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
1. Expenditures and Other Financing Uses (Form 011, objects 1000-7999) (Form MYPI, Line B11)	37,914,117.33	34,234,068.48	32,903,974.48
2. Plus: Special Education Pass-through (Criterion 10A, Line 2b, if Criterion 10A, Line 1 is No)			
3. Total Expenditures and Other Financing Uses (Line B1 plus Line B2)	37,914,117.33	34,234,068.48	32,903,974.48

4.	Reserve Standard Percentage Level	3%	3%	3%
5.	Reserve Standard - by Percent (Line B3 times Line B4)	1,137,423.52	1,027,022.05	987,119.23
6.	Reserve Standard - by Amount (\$80,000 for districts with 0 to 1,000 ADA, else 0)	0.00	0.00	0.00
7.	District's Reserve Standard (Greater of Line B5 or Line B6)	1,137,423.52	1,027,022.05	987,119.23

10C. Calculating the District's Available Reserve Amount

DATA ENTRY: All data are extracted from fund data and Form MYPI. If Form MYPI does not exist, enter data for the two subsequent years.

Reserve Amounts (Unrestricted resources 0000-1999 except Line 4)	Current Year		
	Projected Year Totals (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
1. General Fund - Stabilization Arrangements (Fund 01, Object 9750) (Form MYPI, Line E1a)	0.00		
2. General Fund - Reserve for Economic Uncertainties (Fund 01, Object 9789) (Form MYPI, Line E1b)	1,895,706.00	1,711,703.00	1,645,197.00
3. General Fund - Unassigned/Unappropriated Amount (Fund 01, Object 9790) (Form MYPI, Line E1c)	5,637,975.58	4,626,584.01	3,973,049.23
4. General Fund - Negative Ending Balances in Restricted Resources (Fund 01, Object 979Z, if negative, for each of resources 2000-9999) (Form MYPI, Line E1d)	0.00	0.00	0.00
5. Special Reserve Fund - Stabilization Arrangements (Fund 17, Object 9750) (Form MYPI, Line E2a)	0.00		
6. Special Reserve Fund - Reserve for Economic Uncertainties (Fund 17, Object 9789) (Form MYPI, Line E2b)	0.00		
7. Special Reserve Fund - Unassigned/Unappropriated Amount (Fund 17, Object 9790) (Form MYPI, Line E2c)	0.00		
8. District's Available Reserve Amount (Lines C1 thru C7)	7,537,681.58	6,338,287.01	5,618,246.23
9. District's Available Reserve Percentage (Information only) (Line 8 divided by Section 10B, Line 3)	19.87%	18.51%	17.07%
District's Reserve Standard (Section 10B, Line 7):	1,137,423.52	1,027,022.05	987,119.23
Status:	Met	Met	Met

10D. Comparison of District Reserve Amount to the Standard

DATA ENTRY: Enter an explanation if the standard is not met.

1a. STANDARD MET - Available reserves have met the standard for the current year and two subsequent fiscal years.

Explanation:
(required if NOT met)

SUPPLEMENTAL INFORMATION

DATA ENTRY: Click the appropriate Yes or No button for items S1 through S4. Enter an explanation for each Yes answer.

S1. Contingent Liabilities

1a. Does your district have any known or contingent liabilities (e.g., financial or program audits, litigation, state compliance reviews) that have occurred since budget adoption that may impact the budget?

1b. If Yes, identify the liabilities and how they may impact the budget:

S2. Use of One-time Revenues for Ongoing Expenditures

1a. Does your district have ongoing general fund expenditures funded with one-time revenues that have changed since budget adoption by more than five percent?

1b. If Yes, identify the expenditures and explain how the one-time resources will be replaced to continue funding the ongoing expenditures in the following fiscal years:

S3. Temporary Interfund Borrowings

1a. Does your district have projected temporary borrowings between funds?
(Refer to Education Code Section 42603)

1b. If Yes, identify the interfund borrowings:

S4. Contingent Revenues

1a. Does your district have projected revenues for the current fiscal year or either of the two subsequent fiscal years contingent on reauthorization by the local government, special legislation, or other definitive act (e.g., parcel taxes, forest reserves)?

1b. If Yes, identify any of these revenues that are dedicated for ongoing expenses and explain how the revenues will be replaced or expenditures reduced:

S5. Contributions

Identify projected contributions from unrestricted resources in the general fund to restricted resources in the general fund for the current fiscal year and two subsequent fiscal years. Provide an explanation if contributions have changed by more than \$20,000 and more than five percent since budget adoption.

Identify projected transfers to or from the general fund to cover operating deficits in either the general fund or any other fund for the current fiscal year and two subsequent fiscal years. Provide an explanation if transfers have changed by more than \$20,000 and more than five percent since budget adoption.

Identify capital project cost overruns that have occurred since budget adoption that may impact the general fund budget.

District's Contributions and Transfers Standard: -5.0% to +5.0% or -\$20,000 to +\$20,000

S5A. Identification of the District's Projected Contributions, Transfers, and Capital Projects that may Impact the General Fund

DATA ENTRY: Budget Adoption data that exist will be extracted; otherwise, enter data into the first column. For Contributions, the First Interim's Current Year data will be extracted. Enter First Interim Contributions for the 1st and 2nd Subsequent Years. For Transfers In and Transfers Out, the First Interim's Current Year data will be extracted. If Form MYPI exists, the data will be extracted into the First Interim column for the 1st and 2nd Subsequent Years. If Form MYPI does not exist, enter data for 1st and 2nd Subsequent Years. Click on the appropriate button for Item 1d; all other data will be calculated.

Description / Fiscal Year	Budget Adoption (Form 01CS, Item S5A)	First Interim Projected Year Totals	Percent Change	Amount of Change	Status
1a. Contributions, Unrestricted General Fund					
(Fund 01, Resources 0000-1999, Object 8980)					
Current Year (2023-24)	(5,205,852.15)	(5,054,413.84)	-2.9%	(151,438.31)	Met
1st Subsequent Year (2024-25)	(5,205,852.15)	(5,054,413.00)	-2.9%	(151,439.15)	Met
2nd Subsequent Year (2025-26)	(5,205,852.15)	(5,273,684.00)	1.3%	67,831.85	Met
1b. Transfers In, General Fund *					
Current Year (2023-24)	0.00	0.00	0.0%	0.00	Met
1st Subsequent Year (2024-25)	0.00	0.00	0.0%	0.00	Met
2nd Subsequent Year (2025-26)	0.00	0.00	0.0%	0.00	Met
1c. Transfers Out, General Fund *					
Current Year (2023-24)	0.00	0.00	0.0%	0.00	Met
1st Subsequent Year (2024-25)	0.00	0.00	0.0%	0.00	Met
2nd Subsequent Year (2025-26)	0.00	0.00	0.0%	0.00	Met

1d. Capital Project Cost Overruns

Have capital project cost overruns occurred since budget adoption that may impact the general fund operational budget?

No

* Include transfers used to cover operating deficits in either the general fund or any other fund.

S5B. Status of the District's Projected Contributions, Transfers, and Capital Projects

DATA ENTRY: Enter an explanation if Not Met for items 1a-1c or if Yes for Item 1d.

1a. MET - Projected contributions have not changed since budget adoption by more than the standard for the current year and two subsequent fiscal years.

Explanation:
(required if NOT met)

1b. MET - Projected transfers in have not changed since budget adoption by more than the standard for the current year and two subsequent fiscal years.

Explanation:
(required if NOT met)

1c. MET - Projected transfers out have not changed since budget adoption by more than the standard for the current year and two subsequent fiscal years.

Explanation:
(required if NOT met)

1d. NO - There have been no capital project cost overruns occurring since budget adoption that may impact the general fund operational budget.

Project Information:
(required if YES)

S6. Long-term Commitments

Identify all existing and new multiyear commitments¹ and their annual required payment for the current fiscal year and two subsequent fiscal years. Explain how any increase in annual payments will be funded. Also, explain how any decrease to funding sources used to pay long-term commitments will be replaced.

¹ Include multiyear commitments, multiyear debt agreements, and new programs or contracts that result in long-term obligations.

S6A. Identification of the District's Long-term Commitments

DATA ENTRY: If Budget Adoption data exist (Form 01CS, Item S6A), long-term commitment data will be extracted and it will only be necessary to click the appropriate button for Item 1b. Extracted data may be overwritten to update long-term commitment data in Item 2, as applicable. If no Budget Adoption data exist, click the appropriate buttons for items 1a and 1b, and enter all other data, as applicable.

1. a. Does your district have long-term (multiyear) commitments?
(If No, skip items 1b and 2 and sections S6B and S6C)

b. If Yes to Item 1a, have new long-term (multiyear) commitments been incurred since budget adoption?

2. If Yes to Item 1a, list (or update) all new and existing multiyear commitments and required annual debt service amounts. Do not include long-term commitments for postemployment benefits other than pensions (OPEB); OPEB is disclosed in Item S7A.

Type of Commitment	# of Years Remaining	SACS Fund and Object Codes Used For:		Principal Balance as of July 1, 2023-24
		Funding Sources (Revenues)	Debt Service (Expenditures)	
Capital Leases				
Certificates of Participation				
General Obligation Bonds	26	Fund 51	7438/7439	18,990,000
Supp Early Retirement Program				
State School Building Loans				
Compensated Absences				
Other Long-term Commitments (do not include OPEB):				
Bond Sale - \$6,800,000				
TOTAL:				18,990,000

Type of Commitment (continued)	Prior Year	Current Year	1st Subsequent Year	2nd Subsequent Year
	(2022-23)	(2023-24)	(2024-25)	(2025-26)
	Annual Payment (P & I)	Annual Payment (P & I)	Annual Payment (P & I)	Annual Payment (P & I)
Capital Leases				
Certificates of Participation				
General Obligation Bonds				
Supp Early Retirement Program				
State School Building Loans				
Compensated Absences				
Other Long-term Commitments (continued):				
Bond Sale - \$6,800,000				

Total Annual Payments:	0	0	0	0
Has total annual payment increased over prior year (2022-23)?	No	No	No	No

S6B. Comparison of the District's Annual Payments to Prior Year Annual Payment

DATA ENTRY: Enter an explanation if Yes.

- 1a. No - Annual payments for long-term commitments have not increased in one or more of the current and two subsequent fiscal years.

Explanation:
(Required if Yes
to increase in total
annual payments)

S6C. Identification of Decreases to Funding Sources Used to Pay Long-term Commitments

DATA ENTRY: Click the appropriate Yes or No button in Item 1; if Yes, an explanation is required in Item 2.

1. Will funding sources used to pay long-term commitments decrease or expire prior to the end of the commitment period, or are they one-time sources?

No

2. No - Funding sources will not decrease or expire prior to the end of the commitment period, and one-time funds are not being used for long-term commitment.

Explanation:
(Required if Yes)

S7. Unfunded Liabilities

Identify any changes in estimates for unfunded liabilities since budget adoption, and indicate whether the changes are the result of a new actuarial valuation.

S7A. Identification of the District's Estimated Unfunded Liability for Postemployment Benefits Other Than Pensions (OPEB)

DATA ENTRY: Click the appropriate button(s) for items 1a-1c, as applicable. Budget Adoption data that exist (Form 01CS, Item S7A) will be extracted; otherwise, enter Budget Adoption and First Interim data in items 2-4.

1 a. Does your district provide postemployment benefits other than pensions (OPEB)? (If No, skip items 1b-4)

Yes

b. If Yes to Item 1a, have there been changes since budget adoption in OPEB liabilities?

No

c. If Yes to Item 1a, have there been changes since budget adoption in OPEB contributions?

--

	Budget Adoption	
	(Form 01CS, Item S7A)	First Interim
2 OPEB Liabilities		
a. Total OPEB liability	10,034,819.00	10,034,819.00
b. OPEB plan(s) fiduciary net position (if applicable)	8,849,295.00	8,849,295.00
c. Total/Net OPEB liability (Line 2a minus Line 2b)	1,185,524.00	1,185,524.00

d. Is total OPEB liability based on the district's estimate or an actuarial valuation?

Actuarial	
Jun 30, 2021	

Data must be entered.

	Budget Adoption	
	(Form 01CS, Item S7A)	First Interim
3 OPEB Contributions		
a. OPEB actuarially determined contribution (ADC) if available, per actuarial valuation or Alternative Measurement Method		
Current Year (2023-24)	821,257.00	821,257.00
1st Subsequent Year (2024-25)	821,257.00	821,257.00
2nd Subsequent Year (2025-26)	821,257.00	

Data must be entered.

b. OPEB amount contributed (for this purpose, include premiums paid to a self-insurance fund) (Funds 01-70, objects 3701-3752)		
Current Year (2023-24)	66,685.00	170,327.38
1st Subsequent Year (2024-25)	66,685.00	170,327.00
2nd Subsequent Year (2025-26)	66,685.00	170,327.00

c. Cost of OPEB benefits (equivalent of "pay-as-you-go" amount)		
Current Year (2023-24)	158,044.00	158,044.00
1st Subsequent Year (2024-25)	158,044.00	158,044.00
2nd Subsequent Year (2025-26)	158,044.00	158,044.00

d. Number of retirees receiving OPEB benefits		
Current Year (2023-24)	31	31
1st Subsequent Year (2024-25)	31	31
2nd Subsequent Year (2025-26)	31	31

4. Comments:

--

S7B. Identification of the District's Unfunded Liability for Self-insurance Programs

DATA ENTRY: Click the appropriate button(s) for items 1a-1c, as applicable. Budget Adoption data that exist (Form 01CS, Item S7B) will be extracted; otherwise, enter Budget Adoption and First Interim data in items 2-4.

- 1 a. Does your district operate any self-insurance programs such as workers' compensation, employee health and welfare, or property and liability? (Do not include OPEB; which is covered in Section S7A) (If No, skip items 1b-4)
-
- b. If Yes to item 1a, have there been changes since budget adoption in self-insurance liabilities?
-
- c. If Yes to item 1a, have there been changes since budget adoption in self-insurance contributions?
-

2 Self-Insurance Liabilities

	Budget Adoption (Form 01CS, Item S7B)	First Interim
a. Accrued liability for self-insurance programs		
b. Unfunded liability for self-insurance programs		

3 Self-Insurance Contributions

	Budget Adoption (Form 01CS, Item S7B)	First Interim
a. Required contribution (funding) for self-insurance programs		
Current Year (2023-24)		
1st Subsequent Year (2024-25)		
2nd Subsequent Year (2025-26)		
b. Amount contributed (funded) for self-insurance programs		
Current Year (2023-24)		
1st Subsequent Year (2024-25)		
2nd Subsequent Year (2025-26)		

4 Comments:

S8. Status of Labor Agreements

Analyze the status of all employee labor agreements. Identify new labor agreements that have been ratified since budget adoption, as well as new commitments provided as part of previously ratified multiyear agreements; and include all contracts, including all administrator contracts (and including all compensation). For new agreements, indicate the date of the required board meeting. Compare the increase in new commitments to the projected increase in ongoing revenues, and explain how these commitments will be funded in future fiscal years.

If salary and benefit negotiations are not finalized, upon settlement with certificated or classified staff:

The school district must determine the cost of the settlement, including salaries, benefits, and any other agreements that change costs, and provide the county office of education (COE) with an analysis of the cost of the settlement and its impact on the operating budget.

The county superintendent shall review the analysis relative to the criteria and standards and may provide written comments to the president of the district governing board and superintendent.

S8A. Cost Analysis of District's Labor Agreements - Certificated (Non-management) Employees

DATA ENTRY: Click the appropriate Yes or No button for "Status of Certificated Labor Agreements as of the Previous Reporting Period." There are no extractions in this section.

Status of Certificated Labor Agreements as of the Previous Reporting Period

Were all certificated labor negotiations settled as of budget adoption?

No

If Yes, complete number of FTEs, then skip to section S8B.

If No, continue with section S8A.

Certificated (Non-management) Salary and Benefit Negotiations

	Prior Year (2nd Interim) (2022-23)	Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
Number of certificated (non-management) full-time-equivalent (FTE) positions	123.3	127.0	127.0	127.0

1a. Have any salary and benefit negotiations been settled since budget adoption?

Yes

If Yes, and the corresponding public disclosure documents have been filed with the COE, complete questions 2 and 3.

If Yes, and the corresponding public disclosure documents have not been filed with the COE, complete questions 2-5.

If No, complete questions 6 and 7.

1b. Are any salary and benefit negotiations still unsettled?

No

If Yes, complete questions 6 and 7.

Negotiations Settled Since Budget Adoption

2a. Per Government Code Section 3547.5(a), date of public disclosure board meeting:

Oct 10, 2023

2b. Per Government Code Section 3547.5(b), was the collective bargaining agreement certified by the district superintendent and chief business official?

Yes

If Yes, date of Superintendent and CBO certification:

Oct 10, 2023

3. Per Government Code Section 3547.5(c), was a budget revision adopted to meet the costs of the collective bargaining agreement?

Yes

If Yes, date of budget revision board adoption:

Dec 12, 2023

4. Period covered by the agreement:

Begin Date: Jul 01, 2023

End Date: Jun 30, 2024

5. Salary settlement:

	Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
Is the cost of salary settlement included in the interim and multiyear projections (MYPs)?	Yes	Yes	Yes

Is the cost of salary settlement included in the interim and multiyear projections (MYPs)?

One Year Agreement

Total cost of salary settlement

--	--	--

% change in salary schedule from prior year

8.0%		
------	--	--

or

Multiyear Agreement

Total cost of salary settlement

--	--	--

% change in salary schedule from prior year (may enter text, such as "Reopener")

--	--	--

Identify the source of funding that will be used to support multiyear salary commitments:

Negotiations Not Settled

6. Cost of a one percent increase in salary and statutory benefits

--

Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
---------------------------	----------------------------------	----------------------------------

7. Amount included for any tentative salary schedule increases

--	--	--

Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
---------------------------	----------------------------------	----------------------------------

Certificated (Non-management) Health and Welfare (H&W) Benefits

1. Are costs of H&W benefit changes included in the interim and MYPs?
2. Total cost of H&W benefits
3. Percent of H&W cost paid by employer
4. Percent projected change in H&W cost over prior year

Yes	Yes	Yes

Certificated (Non-management) Prior Year Settlements Negotiated Since Budget Adoption

Are any new costs negotiated since budget adoption for prior year settlements included in the interim?

No

If Yes, amount of new costs included in the interim and MYPs

--	--	--

If Yes, explain the nature of the new costs:

--

Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
---------------------------	----------------------------------	----------------------------------

Certificated (Non-management) Step and Column Adjustments

1. Are step & column adjustments included in the interim and MYPs?
2. Cost of step & column adjustments
3. Percent change in step & column over prior year

Yes	Yes	Yes

Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
---------------------------	----------------------------------	----------------------------------

Certificated (Non-management) Attrition (layoffs and retirements)

1. Are savings from attrition included in the interim and MYPs?
2. Are additional H&W benefits for those laid-off or retired employees included in the interim and MYPs?

Yes	Yes	Yes
Yes	Yes	Yes

Certificated (Non-management) - Other

List other significant contract changes that have occurred since budget adoption and the cost impact of each change (i.e., class size, hours of employment, leave of absence, bonuses, etc.):

S8B. Cost Analysis of District's Labor Agreements - Classified (Non-management) Employees

DATA ENTRY: Click the appropriate Yes or No button for "Status of Classified Labor Agreements as of the Previous Reporting Period." There are no extractions in this section.

Status of Classified Labor Agreements as of the Previous Reporting Period

Were all classified labor negotiations settled as of budget adoption?

If Yes, complete number of FTEs, then skip to section S8C.

If No, continue with section S8B.

No

Classified (Non-management) Salary and Benefit Negotiations

	Prior Year (2nd Interim) (2022-23)	Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
Number of classified (non-management) FTE positions	90.4	93.0	93.0	93.0

1a. Have any salary and benefit negotiations been settled since budget adoption?

Yes

If Yes, and the corresponding public disclosure documents have been filed with the COE, complete questions 2 and 3.

If Yes, and the corresponding public disclosure documents have not been filed with the COE, complete questions 2-5.

If No, complete questions 6 and 7.

1b. Are any salary and benefit negotiations still unsettled?

No

If Yes, complete questions 6 and 7.

Negotiations Settled Since Budget Adoption

2a. Per Government Code Section 3547.5(a), date of public disclosure board meeting:

Nov 12, 2023

2b. Per Government Code Section 3547.5(b), was the collective bargaining agreement certified by the district superintendent and chief business official?

Yes

If Yes, date of Superintendent and CBO certification:

Nov 12, 2023

3. Per Government Code Section 3547.5(c), was a budget revision adopted to meet the costs of the collective bargaining agreement?

Yes

If Yes, date of budget revision board adoption:

Dec 12, 2023

4. Period covered by the agreement:

Begin Date:

Jul 01, 2023

End Date:

Jun 30, 2024

5. Salary settlement:

	Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
--	---------------------------	----------------------------------	----------------------------------

Is the cost of salary settlement included in the interim and multiyear projections (MYPs)?

Yes	Yes	Yes
-----	-----	-----

One Year Agreement

Total cost of salary settlement

--	--	--

% change in salary schedule from prior year

8.0%

or

Multiyear Agreement

Total cost of salary settlement

--	--	--

% change in salary schedule from prior year
(may enter text, such as "Reopener")

--	--	--

Identify the source of funding that will be used to support multiyear salary commitments:

--

Negotiations Not Settled

6. Cost of a one percent increase in salary and statutory benefits

--

	Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
--	---------------------------	----------------------------------	----------------------------------

7. Amount included for any tentative salary schedule increases

--	--	--

	Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
Classified (Non-management) Health and Welfare (H&W) Benefits			
1. Are costs of H&W benefit changes included in the interim and MYPs?	Yes	Yes	Yes
2. Total cost of H&W benefits			
3. Percent of H&W cost paid by employer			
4. Percent projected change in H&W cost over prior year			

Classified (Non-management) Prior Year Settlements Negotiated Since Budget Adoption			
Are any new costs negotiated since budget adoption for prior year settlements included in the interim?	No		
If Yes, amount of new costs included in the interim and MYPs			
If Yes, explain the nature of the new costs:			

	Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
Classified (Non-management) Step and Column Adjustments			
1. Are step & column adjustments included in the interim and MYPs?	Yes	Yes	Yes
2. Cost of step & column adjustments			
3. Percent change in step & column over prior year			

	Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
Classified (Non-management) Attrition (layoffs and retirements)			
1. Are savings from attrition included in the interim and MYPs?	Yes	Yes	Yes
2. Are additional H&W benefits for those laid-off or retired employees included in the interim and MYPs?	Yes	Yes	Yes

Classified (Non-management) - Other

List other significant contract changes that have occurred since budget adoption and the cost impact of each (i.e., hours of employment, leave of absence, bonuses, etc.):

S8C. Cost Analysis of District's Labor Agreements - Management/Supervisor/Confidential Employees

DATA ENTRY: Click the appropriate Yes or No button for "Status of Management/Supervisor/Confidential Labor Agreements as of the Previous Reporting Period." There are no extractions in this section.

Status of Management/Supervisor/Confidential Labor Agreements as of the Previous Reporting Period

Were all managerial/confidential labor negotiations settled as of budget adoption?

No

If Yes or n/a, complete number of FTEs, then skip to S9.

If No, continue with section S8C.

Management/Supervisor/Confidential Salary and Benefit Negotiations

	Prior Year (2nd Interim) (2022-23)	Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
Number of management, supervisor, and confidential FTE positions	23.6	25.6	25.6	25.6

1a. Have any salary and benefit negotiations been settled since budget adoption?

Yes

If Yes, complete question 2.

If No, complete questions 3 and 4.

1b. Are any salary and benefit negotiations still unsettled?

No

If Yes, complete questions 3 and 4.

Negotiations Settled Since Budget Adoption

2. Salary settlement:

	Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
--	---------------------------	----------------------------------	----------------------------------

Is the cost of salary settlement included in the interim and multiyear projections (MYPs)?

Yes	Yes	Yes
Total cost of salary settlement		
8.0%		

Total cost of salary settlement

Change in salary schedule from prior year (may enter text, such as "Reopener")

Negotiations Not Settled

3. Cost of a one percent increase in salary and statutory benefits

--

	Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
--	---------------------------	----------------------------------	----------------------------------

4. Amount included for any tentative salary schedule increases

--	--	--

Management/Supervisor/Confidential

Health and Welfare (H&W) Benefits

	Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
--	---------------------------	----------------------------------	----------------------------------

1. Are costs of H&W benefit changes included in the interim and MYPs?

Yes	Yes	Yes
2. Total cost of H&W benefits		
3. Percent of H&W cost paid by employer		
4. Percent projected change in H&W cost over prior year		

Management/Supervisor/Confidential

Step and Column Adjustments

	Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
--	---------------------------	----------------------------------	----------------------------------

1. Are step & column adjustments included in the interim and MYPs?

Yes	Yes	Yes
2. Cost of step & column adjustments		
3. Percent change in step and column over prior year		

Management/Supervisor/Confidential

Other Benefits (mileage, bonuses, etc.)

	Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
--	---------------------------	----------------------------------	----------------------------------

1. Are costs of other benefits included in the interim and MYPs?

Yes	Yes	Yes
2. Total cost of other benefits		

3. Percent change in cost of other benefits over prior year

--	--	--

S9. Status of Other Funds

Analyze the status of other funds that may have negative fund balances at the end of the current fiscal year. If any other fund has a projected negative fund balance, prepare an interim report and multiyear projection for that fund. Explain plans for how and when the negative fund balance will be addressed.

S9A. Identification of Other Funds with Negative Ending Fund Balances

DATA ENTRY: Click the appropriate button in Item 1. If Yes, enter data in Item 2 and provide the reports referenced in Item 1.

1. Are any funds other than the general fund projected to have a negative fund balance at the end of the current fiscal year?

If Yes, prepare and submit to the reviewing agency a report of revenues, expenditures, and changes in fund balance (e.g., an interim fund report) and a multiyear projection report for each fund.

2. If Yes, identify each fund, by name and number, that is projected to have a negative ending fund balance for the current fiscal year. Provide reasons for the negative balance(s) and explain the plan for how and when the problem(s) will be corrected.

ADDITIONAL FISCAL INDICATORS

The following fiscal indicators are designed to provide additional data for reviewing agencies. A "Yes" answer to any single indicator does not necessarily suggest a cause for concern, but may alert the reviewing agency to the need for additional review. DATA ENTRY: Click the appropriate Yes or No button for items A2 through A9; Item A1 is automatically completed based on data from Criterion 9.

- A1. Do cash flow projections show that the district will end the current fiscal year with a negative cash balance in the general fund? (Data from Criterion 9B-1, Cash Balance, are used to determine Yes or No)

- A2. Is the system of personnel position control independent from the payroll system?

- A3. Is enrollment decreasing in both the prior and current fiscal years?

- A4. Are new charter schools operating in district boundaries that impact the district's enrollment, either in the prior or current fiscal year?

- A5. Has the district entered into a bargaining agreement where any of the current or subsequent fiscal years of the agreement would result in salary increases that are expected to exceed the projected state funded cost-of-living adjustment?

- A6. Does the district provide uncapped (100% employer paid) health benefits for current or retired employees?

- A7. Is the district's financial system independent of the county office system?

- A8. Does the district have any reports that indicate fiscal distress pursuant to Education Code Section 42127.6(a)? (If Yes, provide copies to the county office of education.)

- A9. Have there been personnel changes in the superintendent or chief business official positions within the last 12 months?

When providing comments for additional fiscal indicators, please include the item number applicable to each comment.

Comments:
(optional)

End of School District First Interim Criteria and Standards Review

Section I - Expenditures	Funds 01, 09, and 62			2023-24 Expenditures
	Goals	Functions	Objects	
A. Total state, federal, and local expenditures (all resources)	All	All	1000-7999	37,914,117.33
B. Less all federal expenditures not allowed for MOE (Resources 3000-5999, except 3385)	All	All	1000-7999	4,391,416.19
C. Less state and local expenditures not allowed for MOE: (All resources, except federal as identified in Line B)				
1. Community Services	All	5000-5999	1000-7999	0.00
2. Capital Outlay	All except 7100-7199	All except 5000-5999	6000-6999 except 6600, 6910	561,446.19
3. Debt Service	All	9100	5400-5450, 5800, 7430-7439	13,500.00
4. Other Transfers Out	All	9200	7200-7299	0.00
5. Interfund Transfers Out	All	9300	7600-7629	0.00
6. All Other Financing Uses	All	9100	7699	0.00
		9200	7651	
7. Nonagency	7100-7199	All except 5000-5999, 9000-9999	1000-7999	0.00
8. Tuition (Revenue, in lieu of expenditures, to approximate costs of services for which tuition is received)	All	All	8710	0.00

<p>9. Supplemental expenditures made as a result of a Presidentially declared disaster</p>	<p>Manually entered. Must not include expenditures in lines B, C1-C8, D1, or D2.</p>			<p>0.00</p>
<p>10. Total state and local expenditures not allowed for MOE calculation (Sum lines C1 through C9)</p>				<p>574,946.19</p>
<p>D. Plus additional MOE expenditures:</p>	<p>1. Expenditures to cover deficits for food services (Funds 13 and 61) (If negative, then zero)</p> <p style="text-align: center;">All</p>	<p style="text-align: center;">All</p>	<p>1000-7143, 7300-7439</p> <p>minus 8000-8699</p>	<p>0.00</p>
<p>2. Expenditures to cover deficits for student body activities</p>			<p>Manually entered. Must not include expenditures in lines A or D1.</p>	
<p>E. Total expenditures subject to MOE (Line A minus lines B and C10, plus lines D1 and D2)</p>				<p>32,947,754.95</p>
<p>Section II - Expenditures Per ADA</p>				<p>2023-24 Annual ADA/Exps. Per ADA</p>
<p>A. Average Daily Attendance (Form AI, Column C, sum of lines A6 and C9)*</p>				<p>1,613.00</p>
<p>B. Expenditures per ADA (Line I.E divided by Line II.A)</p>				<p>20,426.38</p>
<p>Section III - MOE Calculation (For data collection only. Final determination will be done by CDE)</p>	<p>Total</p>			<p>Per ADA</p>

<p>A. Base expenditures (Preloaded expenditures extracted from prior year Unaudited Actuals MOE calculation). (Note: If the prior year MOE was not met, in its final determination, CDE will adjust the prior year base to 90 percent of the preceding prior year amount rather than the actual prior year expenditure amount.)</p>		
<p>1. Adjustment to base expenditure and expenditure per ADA amounts for LEAs failing prior year MOE calculation (From Section IV)</p>		
<p>2. Total adjusted base expenditure amounts (Line A plus Line A.1)</p>		
<p>B. Required effort (Line A.2 times 90%)</p>		
<p>C. Current year expenditures (Line I.E and Line II.B)</p>		
<p>D. MOE deficiency amount, if any (Line B minus Line C) (If negative, then zero)</p>		

<p>E. MOE determination (If one or both of the amounts in line D are zero, the MOE requirement is met; if both amounts are positive, the MOE requirement is not met. If either column in Line A.2 or Line C equals zero, the MOE calculation is incomplete.)</p>	MOE Met	
<p>F. MOE deficiency percentage, if MOE not met; otherwise, zero (Line D divided by Line B) (Funding under ESSA covered programs in FY 2025-26 may be reduced by the lower of the two percentages)</p>	0.00%	0.00%
<p>*Interim Periods - Annual ADA not available from Form AI. For your convenience, Projected Year Totals Estimated P-2 ADA is extracted. Manual adjustment may be required to reflect estimated Annual ADA.</p>		

SECTION IV - Detail of Adjustments to Base Expenditures (used in Section III, Line A.1)		
Description of Adjustments	Total Expenditures	Expenditures Per ADA
Total adjustments to base expenditures	0.00	0.00

Part I - General Administrative Share of Plant Services Costs

California's indirect cost plan allows that the general administrative costs in the indirect cost pool may include that portion of plant services costs (maintenance and operations costs and facilities rents and leases costs) attributable to the general administrative offices. The calculation of the plant services costs attributed to general administration and included in the pool is standardized and automated using the percentage of salaries and benefits relating to general administration as proxy for the percentage of square footage occupied by general administration.

A. Salaries and Benefits - Other General Administration and Centralized Data Processing

- 1. Salaries and benefits paid through payroll (Funds 01, 09, and 62, objects 1000-3999 except 3701-3702)
(Functions 7200-7700, goals 0000 and 9000) 891,839.25
- 2. Contracted general administrative positions not paid through payroll
 - a. Enter the costs, if any, of general administrative positions performing services ON SITE but paid through a contract, rather than through payroll, in functions 7200-7700, goals 0000 and 9000, Object 5800. 0.00
 - b. If an amount is entered on Line A2a, provide the title, duties, and approximate FTE of each general administrative position paid through a contract. Retain supporting documentation in case of audit.

B. Salaries and Benefits - All Other Activities

- 1. Salaries and benefits paid through payroll (Funds 01, 09, and 62, objects 1000-3999 except 3701-3702)
(Functions 1000-6999, 7100-7180, & 8100-8400; Functions 7200-7700, all goals except 0000 & 9000) 24,196,832.10

C. Percentage of Plant Services Costs Attributable to General Administration

(Line A1 plus Line A2a, divided by Line B1; zero if negative) (See Part III, Lines A5 and A6) 3.69%

Part II - Adjustments for Employment Separation Costs

When an employee separates from service, the local educational agency (LEA) may incur costs associated with the separation in addition to the employee's regular salary and benefits for the final pay period. These additional costs can be categorized as "normal" or "abnormal or mass" separation costs.

Normal separation costs include items such as pay for accumulated unused leave or routine severance pay authorized by governing board policy. Normal separation costs are not allowable as direct costs to federal programs, but are allowable as indirect costs. State programs may have similar restrictions. Where federal or state program guidelines required that the LEA charge an employee's normal separation costs to an unrestricted resource rather than to the restricted program in which the employee worked, the LEA may identify and enter these costs on Line A for inclusion in the indirect cost pool.

Abnormal or mass separation costs are those costs resulting from actions taken by an LEA to influence employees to terminate their employment earlier than they normally would have. Abnormal or mass separation costs include retirement incentives such as a Golden Handshake or severance packages negotiated to effect termination. Abnormal or mass separation costs may not be charged to federal programs as either direct costs or indirect costs. Where an LEA paid abnormal or mass separation costs on behalf of positions in general administrative functions included in the indirect cost pool, the LEA must identify and enter these costs on Line B for exclusion from the pool.

A. Normal Separation Costs (optional)

Enter any normal separation costs paid on behalf of employees of restricted state or federal programs that were charged to an unrestricted resource (0000-1999) in funds 01, 09, and 62 with functions 1000-6999 or 8100-8400 rather than to the restricted program. These costs will be moved in Part III from base costs to the indirect cost pool. 0.00
Retain supporting documentation.

B. Abnormal or Mass Separation Costs (required)

Enter any abnormal or mass separation costs paid on behalf of general administrative positions charged to unrestricted resources (0000-1999) in funds 01, 09, and 62 with functions 7200-7700. These costs will be moved in Part III from the indirect cost pool to base costs. If none, enter zero. 0.00

Part III - Indirect Cost Rate Calculation (Funds 01, 09, and 62, unless indicated otherwise)

A. Indirect Costs

- 1. Other General Administration, less portion charged to restricted resources or specific goals
(Functions 7200-7600, objects 1000-5999, minus Line B9) 1,625,933.25
- 2. Centralized Data Processing, less portion charged to restricted resources or specific goals
(Function 7700, objects 1000-5999, minus Line B10) 12,000.00

3. External Financial Audit - Single Audit (Function 7190, resources 0000-1999, goals 0000 and 9000, objects 5000 - 5999)	52,500.00
4. Staff Relations and Negotiations (Function 7120, resources 0000-1999, goals 0000 and 9000, objects 1000 - 5999)	9,000.00
5. Plant Maintenance and Operations (portion relating to general administrative offices only) (Functions 8100-8400, objects 1000-5999 except 5100, times Part I, Line C)	140,173.58
6. Facilities Rents and Leases (portion relating to general administrative offices only) (Function 8700, resources 0000-1999, objects 1000-5999 except 5100, times Part I, Line C)	0.00
7. Adjustment for Employment Separation Costs	
a. Plus: Normal Separation Costs (Part II, Line A)	0.00
b. Less: Abnormal or Mass Separation Costs (Part II, Line B)	0.00
8. Total Indirect Costs (Lines A1 through A7a, minus Line A7b)	1,839,606.83
9. Carry-Forward Adjustment (Part IV, Line F)	0.00
10. Total Adjusted Indirect Costs (Line A8 plus Line A9)	1,839,606.83
B. Base Costs	
1. Instruction (Functions 1000-1999, objects 1000-5999 except 5100)	21,462,949.63
2. Instruction-Related Services (Functions 2000-2999, objects 1000-5999 except 5100)	3,151,148.90
3. Pupil Services (Functions 3000-3999, objects 1000-5999 except 4700 and 5100)	4,739,669.43
4. Ancillary Services (Functions 4000-4999, objects 1000-5999 except 5100)	197,504.24
5. Community Services (Functions 5000-5999, objects 1000-5999 except 5100)	0.00
6. Enterprise (Function 6000, objects 1000-5999 except 4700 and 5100)	0.00
7. Board and Superintendent (Functions 7100-7180, objects 1000-5999, minus Part III, Line A4)	571,059.72
8. External Financial Audit - Single Audit and Other (Functions 7190-7191, objects 5000 - 5999, minus Part III, Line A3)	0.00
9. Other General Administration (portion charged to restricted resources or specific goals only) (Functions 7200-7600, resources 2000-9999, objects 1000-5999; Functions 7200-7600, resources 0000-1999, all goals except 0000 and 9000, objects 1000-5999)	6,791.21
10. Centralized Data Processing (portion charged to restricted resources or specific goals only) (Function 7700, resources 2000-9999, objects 1000-5999; Function 7700, resources 0000-1999, all goals except 0000 and 9000, objects 1000-5999)	0.00
11. Plant Maintenance and Operations (all except portion relating to general administrative offices) (Functions 8100-8400, objects 1000-5999 except 5100, minus Part III, Line A5)	3,658,568.32
12. Facilities Rents and Leases (all except portion relating to general administrative offices) (Function 8700, objects 1000-5999 except 5100, minus Part III, Line A6)	0.00
13. Adjustment for Employment Separation Costs	
a. Less: Normal Separation Costs (Part II, Line A)	0.00
b. Plus: Abnormal or Mass Separation Costs (Part II, Line B)	0.00
14. Student Activity (Fund 08, functions 4000-5999, objects 1000-5999 except 5100)	0.00
15. Adult Education (Fund 11, functions 1000-6999, 8100-8400, and 8700, objects 1000-5999 except 5100)	147,177.16
16. Child Development (Fund 12, functions 1000-6999, 8100-8400 & 8700, objects 1000-5999 except 4700 & 5100)	465,706.22
17. Cafeteria (Funds 13 & 61, functions 1000-6999, 8100-8400 & 8700, objects 1000-5999 except 4700 & 5100)	1,411,009.75
18. Foundation (Funds 19 & 57, functions 1000-6999, 8100-8400 & 8700, objects 1000-5999 except 4700 & 5100)	0.00
19. Total Base Costs (Lines B1 through B12 and Lines B13b through B18, minus Line B13a)	35,811,584.58
C. Straight Indirect Cost Percentage Before Carry-Forward Adjustment (For information only - not for use when claiming/recovering indirect costs) (Line A8 divided by Line B19)	
	5.14%
D. Preliminary Proposed Indirect Cost Rate (For final approved fixed-with-carry-forward rate for use in 2025-26 see www.cde.ca.gov/fg/ac/ic) (Line A10 divided by Line B19)	
	5.14%

Part IV - Carry-forward Adjustment

The carry-forward adjustment is an after-the-fact adjustment for the difference between indirect costs recoverable using the indirect cost rate approved for use in a given year, and the actual indirect costs incurred in that year. The carry-forward adjustment eliminates

the need for LEAs to file amended federal reports when their actual indirect costs vary from the estimated indirect costs on which the approved rate was based.

Where the ratio of indirect costs incurred in the current year is less than the estimated ratio of indirect costs on which the approved rate for use in the current year was based, the carry-forward adjustment is limited by using either the approved rate times current year base costs, or the highest rate actually used to recover costs from any program times current year base costs, if the highest rate used was less than the approved rate. Rates used to recover costs from programs are displayed in Exhibit A.

A. Indirect costs incurred in the current year (Part III, Line A8)	1,839,606.83
B. Carry-forward adjustment from prior year(s)	
1. Carry-forward adjustment from the second prior year	96,555.55
2. Carry-forward adjustment amount deferred from prior year(s), if any	0.00
C. Carry-forward adjustment for under- or over-recovery in the current year	
1. Under-recovery: Part III, Line A8, plus carry-forward adjustment from prior years, minus (approved indirect cost rate (5.63%) times Part III, Line B19); zero if negative	0.00
2. Over-recovery: Part III, Line A8, plus carry-forward adjustment from prior years, minus the lesser of (approved indirect cost rate (5.63%) times Part III, Line B19) or (the highest rate used to recover costs from any program (4.65%) times Part III, Line B19); zero if positive	0.00
D. Preliminary carry-forward adjustment (Line C1 or C2)	0.00
E. Optional allocation of negative carry-forward adjustment over more than one year	
Where a negative carry-forward adjustment causes the proposed approved rate to fall below zero or would reduce the rate at which the LEA could recover indirect costs to such an extent that it would cause the LEA significant fiscal harm, the LEA may request that the carry-forward adjustment be allocated over more than one year. Where allocation of a negative carry-forward adjustment over more than one year does not resolve a negative rate, the CDE will work with the LEA on a case-by-case basis to establish an approved rate.	
Option 1. Preliminary proposed approved rate (Part III, Line D) if entire negative carry-forward adjustment is applied to the current year calculation:	not applicable
Option 2. Preliminary proposed approved rate (Part III, Line D) if one-half of negative carry-forward adjustment is applied to the current year calculation and the remainder is deferred to one or more future years:	not applicable
Option 3. Preliminary proposed approved rate (Part III, Line D) if one-third of negative carry-forward adjustment is applied to the current year calculation and the remainder is deferred to one or more future years:	not applicable
LEA request for Option 1, Option 2, or Option 3	1
F. Carry-forward adjustment used in Part III, Line A9 (Line D minus amount deferred if Option 2 or Option 3 is selected)	0.00

Approved indirect cost rate: 5.63%
Highest rate used in any program: 4.65%

Fund	Resource	Eligible Expenditures (Objects 1000-5999 except 4700 & 5100)	Indirect Costs Charged (Objects 7310 and 7350)	Rate Used
01	6387	230,464.00	10,727.00	4.65%
01	9010	504,627.65	19,216.93	3.81%
11	6391	146,312.16	4,271.00	2.92%
12	6105	463,976.22	12,851.00	2.77%

First Interim
2023-24 Projected Year Totals
SUMMARY OF INTERFUND ACTIVITIES
FOR ALL FUNDS

Description	Direct Costs - Interfund		Indirect Costs - Interfund		Interfund Transfers In 8900-8929	Interfund Transfers Out 7600-7629	Due From Other Funds 9310	Due To Other Funds 9610
	Transfers In 5750	Transfers Out 5750	Transfers In 7350	Transfers Out 7350				
011 GENERAL FUND								
Expenditure Detail	0.00	0.00	0.00	(17,122.00)				
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
081 STUDENT ACTIVITY SPECIAL REVENUE FUND								
Expenditure Detail	0.00	0.00	0.00	0.00				
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
091 CHARTER SCHOOLS SPECIAL REVENUE FUND								
Expenditure Detail	0.00	0.00	0.00	0.00				
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
101 SPECIAL EDUCATION PASS-THROUGH FUND								
Expenditure Detail								
Other Sources/Uses Detail								
Fund Reconciliation								
111 ADULT EDUCATION FUND								
Expenditure Detail	0.00	0.00	4,271.00	0.00				
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
121 CHILD DEVELOPMENT FUND								
Expenditure Detail	0.00	0.00	12,851.00	0.00				
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
131 CAFETERIA SPECIAL REVENUE FUND								
Expenditure Detail	0.00	0.00	0.00	0.00				
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
141 DEFERRED MAINTENANCE FUND								
Expenditure Detail	0.00	0.00						
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
151 PUPIL TRANSPORTATION EQUIPMENT FUND								
Expenditure Detail	0.00	0.00						
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
171 SPECIAL RESERVE FUND FOR OTHER THAN CAPITAL OUTLAY								
Expenditure Detail								
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
181 SCHOOL BUS EMISSIONS REDUCTION FUND								
Expenditure Detail	0.00	0.00						
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
191 FOUNDATION SPECIAL REVENUE FUND								
Expenditure Detail	0.00	0.00	0.00	0.00				
Other Sources/Uses Detail						0.00		
Fund Reconciliation								
201 SPECIAL RESERVE FUND FOR POSTEMPLOYMENT BENEFITS								
Expenditure Detail								
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
211 BUILDING FUND								
Expenditure Detail	0.00	0.00						
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
251 CAPITAL FACILITIES FUND								
Expenditure Detail	0.00	0.00						
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								

Description	Direct Costs - Interfund		Indirect Costs - Interfund		Interfund Transfers In 8900-8929	Interfund Transfers Out 7600-7629	Due From Other Funds 9310	Due To Other Funds 9610
	Transfers In 5750	Transfers Out 5750	Transfers In 7350	Transfers Out 7350				
30I STATE SCHOOL BUILDING LEASE/PURCHASE FUND								
Expenditure Detail	0.00	0.00						
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
35I COUNTY SCHOOL FACILITIES FUND								
Expenditure Detail	0.00	0.00						
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
40I SPECIAL RESERVE FUND FOR CAPITAL OUTLAY PROJECTS								
Expenditure Detail	0.00	0.00						
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
49I CAP PROJ FUND FOR BLENDED COMPONENT UNITS								
Expenditure Detail	0.00	0.00						
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
51I BOND INTEREST AND REDEMPTION FUND								
Expenditure Detail								
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
52I DEBT SVC FUND FOR BLENDED COMPONENT UNITS								
Expenditure Detail								
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
53I TAX OVERRIDE FUND								
Expenditure Detail								
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
56I DEBT SERVICE FUND								
Expenditure Detail								
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
57I FOUNDATION PERMANENT FUND								
Expenditure Detail	0.00	0.00	0.00	0.00				
Other Sources/Uses Detail						0.00		
Fund Reconciliation								
61I CAFETERIA ENTERPRISE FUND								
Expenditure Detail	0.00	0.00	0.00	0.00				
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
62I CHARTER SCHOOLS ENTERPRISE FUND								
Expenditure Detail	0.00	0.00	0.00	0.00				
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
63I OTHER ENTERPRISE FUND								
Expenditure Detail	0.00	0.00						
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
66I WAREHOUSE REVOLVING FUND								
Expenditure Detail	0.00	0.00						
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
67I SELF-INSURANCE FUND								
Expenditure Detail	0.00	0.00						
Other Sources/Uses Detail					0.00	0.00		
Fund Reconciliation								
71I RETIREE BENEFIT FUND								
Expenditure Detail								
Other Sources/Uses Detail					0.00			
Fund Reconciliation								
73I FOUNDATION PRIVATE-PURPOSE TRUST FUND								

First Interim
2023-24 Projected Year Totals
SUMMARY OF INTERFUND ACTIVITIES
FOR ALL FUNDS

Description	Direct Costs - Interfund		Indirect Costs - Interfund		Interfund Transfers In 8900-8929	Interfund Transfers Out 7600-7629	Due From Other Funds 9310	Due To Other Funds 9610
	Transfers In 5750	Transfers Out 5750	Transfers In 7350	Transfers Out 7350				
Expenditure Detail	0.00	0.00						
Other Sources/Uses Detail					0.00			
Fund Reconciliation								
76I WARRANT/PASS-THROUGH FUND								
Expenditure Detail								
Other Sources/Uses Detail								
Fund Reconciliation								
95I STUDENT BODY FUND								
Expenditure Detail								
Other Sources/Uses Detail								
Fund Reconciliation								
TOTALS	0.00	0.00	17,122.00	(17,122.00)	0.00	0.00		

Part I - General Administrative Share of Plant Services Costs

California's indirect cost plan allows that the general administrative costs in the indirect cost pool may include that portion of plant services costs (maintenance and operations costs and facilities rents and leases costs) attributable to the general administrative offices. The calculation of the plant services costs attributed to general administration and included in the pool is standardized and automated using the percentage of salaries and benefits relating to general administration as proxy for the percentage of square footage occupied by general administration.

A. Salaries and Benefits - Other General Administration and Centralized Data Processing

- 1. Salaries and benefits paid through payroll (Funds 01, 09, and 62, objects 1000-3999 except 3701-3702)
(Functions 7200-7700, goals 0000 and 9000) 891,839.25
- 2. Contracted general administrative positions not paid through payroll
 - a. Enter the costs, if any, of general administrative positions performing services ON SITE but paid through a contract, rather than through payroll, in functions 7200-7700, goals 0000 and 9000, Object 5800. 0.00
 - b. If an amount is entered on Line A2a, provide the title, duties, and approximate FTE of each general administrative position paid through a contract. Retain supporting documentation in case of audit.

B. Salaries and Benefits - All Other Activities

- 1. Salaries and benefits paid through payroll (Funds 01, 09, and 62, objects 1000-3999 except 3701-3702)
(Functions 1000-6999, 7100-7180, & 8100-8400; Functions 7200-7700, all goals except 0000 & 9000) 24,196,832.10

C. Percentage of Plant Services Costs Attributable to General Administration

(Line A1 plus Line A2a, divided by Line B1; zero if negative) (See Part III, Lines A5 and A6) 3.69%

Part II - Adjustments for Employment Separation Costs

When an employee separates from service, the local educational agency (LEA) may incur costs associated with the separation in addition to the employee's regular salary and benefits for the final pay period. These additional costs can be categorized as "normal" or "abnormal or mass" separation costs.

Normal separation costs include items such as pay for accumulated unused leave or routine severance pay authorized by governing board policy. Normal separation costs are not allowable as direct costs to federal programs, but are allowable as indirect costs. State programs may have similar restrictions. Where federal or state program guidelines required that the LEA charge an employee's normal separation costs to an unrestricted resource rather than to the restricted program in which the employee worked, the LEA may identify and enter these costs on Line A for inclusion in the indirect cost pool.

Abnormal or mass separation costs are those costs resulting from actions taken by an LEA to influence employees to terminate their employment earlier than they normally would have. Abnormal or mass separation costs include retirement incentives such as a Golden Handshake or severance packages negotiated to effect termination. Abnormal or mass separation costs may not be charged to federal programs as either direct costs or indirect costs. Where an LEA paid abnormal or mass separation costs on behalf of positions in general administrative functions included in the indirect cost pool, the LEA must identify and enter these costs on Line B for exclusion from the pool.

A. Normal Separation Costs (optional)

Enter any normal separation costs paid on behalf of employees of restricted state or federal programs that were charged to an unrestricted resource (0000-1999) in funds 01, 09, and 62 with functions 1000-6999 or 8100-8400 rather than to the restricted program. These costs will be moved in Part III from base costs to the indirect cost pool. 0.00
Retain supporting documentation.

B. Abnormal or Mass Separation Costs (required)

Enter any abnormal or mass separation costs paid on behalf of general administrative positions charged to unrestricted resources (0000-1999) in funds 01, 09, and 62 with functions 7200-7700. These costs will be moved in Part III from the indirect cost pool to base costs. If none, enter zero. 0.00

Part III - Indirect Cost Rate Calculation (Funds 01, 09, and 62, unless indicated otherwise)

A. Indirect Costs

- 1. Other General Administration, less portion charged to restricted resources or specific goals
(Functions 7200-7600, objects 1000-5999, minus Line B9) 1,625,933.25
- 2. Centralized Data Processing, less portion charged to restricted resources or specific goals
(Function 7700, objects 1000-5999, minus Line B10) 12,000.00

3. External Financial Audit - Single Audit (Function 7190, resources 0000-1999, goals 0000 and 9000, objects 5000 - 5999)	52,500.00
4. Staff Relations and Negotiations (Function 7120, resources 0000-1999, goals 0000 and 9000, objects 1000 - 5999)	9,000.00
5. Plant Maintenance and Operations (portion relating to general administrative offices only) (Functions 8100-8400, objects 1000-5999 except 5100, times Part I, Line C)	140,173.58
6. Facilities Rents and Leases (portion relating to general administrative offices only) (Function 8700, resources 0000-1999, objects 1000-5999 except 5100, times Part I, Line C)	0.00
7. Adjustment for Employment Separation Costs	
a. Plus: Normal Separation Costs (Part II, Line A)	0.00
b. Less: Abnormal or Mass Separation Costs (Part II, Line B)	0.00
8. Total Indirect Costs (Lines A1 through A7a, minus Line A7b)	1,839,606.83
9. Carry-Forward Adjustment (Part IV, Line F)	0.00
10. Total Adjusted Indirect Costs (Line A8 plus Line A9)	1,839,606.83
B. Base Costs	
1. Instruction (Functions 1000-1999, objects 1000-5999 except 5100)	21,462,949.63
2. Instruction-Related Services (Functions 2000-2999, objects 1000-5999 except 5100)	3,151,148.90
3. Pupil Services (Functions 3000-3999, objects 1000-5999 except 4700 and 5100)	4,739,669.43
4. Ancillary Services (Functions 4000-4999, objects 1000-5999 except 5100)	197,504.24
5. Community Services (Functions 5000-5999, objects 1000-5999 except 5100)	0.00
6. Enterprise (Function 6000, objects 1000-5999 except 4700 and 5100)	0.00
7. Board and Superintendent (Functions 7100-7180, objects 1000-5999, minus Part III, Line A4)	571,059.72
8. External Financial Audit - Single Audit and Other (Functions 7190-7191, objects 5000 - 5999, minus Part III, Line A3)	0.00
9. Other General Administration (portion charged to restricted resources or specific goals only) (Functions 7200-7600, resources 2000-9999, objects 1000-5999; Functions 7200-7600, resources 0000-1999, all goals except 0000 and 9000, objects 1000-5999)	6,791.21
10. Centralized Data Processing (portion charged to restricted resources or specific goals only) (Function 7700, resources 2000-9999, objects 1000-5999; Function 7700, resources 0000-1999, all goals except 0000 and 9000, objects 1000-5999)	0.00
11. Plant Maintenance and Operations (all except portion relating to general administrative offices) (Functions 8100-8400, objects 1000-5999 except 5100, minus Part III, Line A5)	3,658,568.32
12. Facilities Rents and Leases (all except portion relating to general administrative offices) (Function 8700, objects 1000-5999 except 5100, minus Part III, Line A6)	0.00
13. Adjustment for Employment Separation Costs	
a. Less: Normal Separation Costs (Part II, Line A)	0.00
b. Plus: Abnormal or Mass Separation Costs (Part II, Line B)	0.00
14. Student Activity (Fund 08, functions 4000-5999, objects 1000-5999 except 5100)	0.00
15. Adult Education (Fund 11, functions 1000-6999, 8100-8400, and 8700, objects 1000-5999 except 5100)	147,177.16
16. Child Development (Fund 12, functions 1000-6999, 8100-8400 & 8700, objects 1000-5999 except 4700 & 5100)	465,706.22
17. Cafeteria (Funds 13 & 61, functions 1000-6999, 8100-8400 & 8700, objects 1000-5999 except 4700 & 5100)	1,411,009.75
18. Foundation (Funds 19 & 57, functions 1000-6999, 8100-8400 & 8700, objects 1000-5999 except 4700 & 5100)	0.00
19. Total Base Costs (Lines B1 through B12 and Lines B13b through B18, minus Line B13a)	35,811,584.58
C. Straight Indirect Cost Percentage Before Carry-Forward Adjustment	
(For information only - not for use when claiming/recovering indirect costs)	
(Line A8 divided by Line B19)	5.14%
D. Preliminary Proposed Indirect Cost Rate	
(For final approved fixed-with-carry-forward rate for use in 2025-26 see www.cde.ca.gov/fg/ac/ic)	
(Line A10 divided by Line B19)	5.14%

Part IV - Carry-forward Adjustment

The carry-forward adjustment is an after-the-fact adjustment for the difference between indirect costs recoverable using the indirect cost rate approved for use in a given year, and the actual indirect costs incurred in that year. The carry-forward adjustment eliminates

the need for LEAs to file amended federal reports when their actual indirect costs vary from the estimated indirect costs on which the approved rate was based.

Where the ratio of indirect costs incurred in the current year is less than the estimated ratio of indirect costs on which the approved rate for use in the current year was based, the carry-forward adjustment is limited by using either the approved rate times current year base costs, or the highest rate actually used to recover costs from any program times current year base costs, if the highest rate used was less than the approved rate. Rates used to recover costs from programs are displayed in Exhibit A.

A. Indirect costs incurred in the current year (Part III, Line A8)	1,839,606.83
B. Carry-forward adjustment from prior year(s)	
1. Carry-forward adjustment from the second prior year	96,555.55
2. Carry-forward adjustment amount deferred from prior year(s), if any	0.00
C. Carry-forward adjustment for under- or over-recovery in the current year	
1. Under-recovery: Part III, Line A8, plus carry-forward adjustment from prior years, minus (approved indirect cost rate (5.63%) times Part III, Line B19); zero if negative	0.00
2. Over-recovery: Part III, Line A8, plus carry-forward adjustment from prior years, minus the lesser of (approved indirect cost rate (5.63%) times Part III, Line B19) or (the highest rate used to recover costs from any program (4.65%) times Part III, Line B19); zero if positive	0.00
D. Preliminary carry-forward adjustment (Line C1 or C2)	0.00
E. Optional allocation of negative carry-forward adjustment over more than one year	
Where a negative carry-forward adjustment causes the proposed approved rate to fall below zero or would reduce the rate at which the LEA could recover indirect costs to such an extent that it would cause the LEA significant fiscal harm, the LEA may request that the carry-forward adjustment be allocated over more than one year. Where allocation of a negative carry-forward adjustment over more than one year does not resolve a negative rate, the CDE will work with the LEA on a case-by-case basis to establish an approved rate.	
Option 1. Preliminary proposed approved rate (Part III, Line D) if entire negative carry-forward adjustment is applied to the current year calculation:	not applicable
Option 2. Preliminary proposed approved rate (Part III, Line D) if one-half of negative carry-forward adjustment is applied to the current year calculation and the remainder is deferred to one or more future years:	not applicable
Option 3. Preliminary proposed approved rate (Part III, Line D) if one-third of negative carry-forward adjustment is applied to the current year calculation and the remainder is deferred to one or more future years:	not applicable
LEA request for Option 1, Option 2, or Option 3	1
F. Carry-forward adjustment used in Part III, Line A9 (Line D minus amount deferred if Option 2 or Option 3 is selected)	0.00

Approved indirect cost rate: 5.63%
Highest rate used in any program: 4.65%

Fund	Resource	Eligible Expenditures (Objects 1000-5999 except 4700 & 5100)	Indirect Costs Charged (Objects 7310 and 7350)	Rate Used
01	6387	230,464.00	10,727.00	4.65%
01	9010	504,627.65	19,216.93	3.81%
11	6391	146,312.16	4,271.00	2.92%
12	6105	463,976.22	12,851.00	2.77%

First Interim
Actuals to Date 2023-24
Technical Review Checks
Phase - All
Display - All Technical Checks

River Delta Joint Unified

Sacramento County

Following is a chart of the various types of technical review checks and related requirements:

F - Fatal (Data must be corrected; an explanation is not allowed)

WWC - Warning/Warning with Calculation (If data are not correct, correct the data; if data are correct an explanation is required)

O - Informational (If data are not correct, correct the data; if data are correct an explanation is optional, but encouraged)

IMPORT CHECKS

CHECKFUNCTION - (Fatal) - All FUNCTION codes must be valid. **Passed**

CHECKFUND - (Fatal) - All FUND codes must be valid. **Passed**

CHECKGOAL - (Fatal) - All GOAL codes must be valid. **Passed**

CHECKOBJECT - (Fatal) - All OBJECT codes must be valid. **Passed**

CHECKRESOURCE - (Warning) - All RESOURCE codes must be valid. **Passed**

CHK-FDXRS7690xOB8590 - (Fatal) - Funds 19, 57, 63, 66, 67, and 73 with Object 8590, All Other State Revenue, must be used in combination with Resource 7690, STRS-On Behalf Pension Contributions. **Passed**

CHK-FUNCTIONxOBJECT - (Fatal) - All FUNCTION and OBJECT account code combinations must be valid. **Passed**

CHK-FUNDxFUNCTION-A - (Warning) - All FUND (funds 01 through 12, 19, 57, 62, and 73) and FUNCTION account code combinations should be valid. **Passed**

CHK-FUNDxFUNCTION-B - (Fatal) - All FUND (all funds except for 01 through 12, 19, 57, 62, and 73) and FUNCTION account code combinations must be valid. **Passed**

CHK-FUNDxGOAL - (Warning) - All FUND and GOAL account code combinations should be valid. **Passed**

CHK-FUNDxOBJECT - (Fatal) - All FUND and OBJECT account code combinations must be valid. **Passed**

CHK-FUNDxRESOURCE - (Warning) - All FUND and RESOURCE account code combinations should be valid. **Passed**

CHK-GOALxFUNCTION-A - (Fatal) - Goal and Function account code combinations (all goals with expenditure objects 1000-7999 in functions 1000-1999 and 4000-5999) must be valid. NOTE: Functions not included in the GOALxFUNCTION table (0000, 2000-3999, 6000-6999, 7100-7199, 7210, 8000-8999) are not checked and will pass the TRC. **Passed**

CHK-GOALxFUNCTION-B - (Fatal) - General administration costs (functions 7200-7999, except 7210) must be direct-charged to an Undistributed, Nonagency, or County Services to Districts goal (Goal 0000, 7100-7199, or 8600-8699). **Passed**

CHK-RES6500XOBJ8091 - (Fatal) - There is no activity in Resource 6500 (Special Education) with Object 8091 (LCFF Transfers-Current Year) or 8099 (LCFF/Revenue Limit Transfers-Prior Years). **Passed**

CHK-RESOURCExOBJECTA - (Warning) - All RESOURCE and OBJECT (objects 8000 through 9999, except for 9791, 9793, and 9795) account code combinations should be valid. **Passed**

CHK-RESOURCExOBJECTB - (Informational) - The following combinations for RESOURCE and OBJECT (objects 9791, 9793, and 9795) are invalid: **Exception**

ACCOUNT FD - RS - PY - GO - FN - OB	RESOURCE	OBJECT	VALUE
01-3212-0-0000-0000-9791	3212	9791	(\$44,968.94)
01-3310-0-0000-0000-9791	3310	9791	(\$326,919.00)
01-3310-2-0000-0000-9791	3310	9791	\$326,919.00
01-3327-0-0000-0000-9791	3327	9791	(\$33,153.76)
01-3327-1-0000-0000-9791	3327	9791	\$11,605.76
01-3327-2-0000-0000-9791	3327	9791	\$21,548.00
01-6010-0-0000-0000-9791	6010	9791	\$180,113.55
01-6010-1-0000-0000-9791	6010	9791	(\$180,113.55)
01-6690-0-0000-0000-9791	6690	9791	\$2,000.00
01-7010-0-0000-0000-9791	7010	9791	\$2,063.84
01-7010-1-0000-0000-9791	7010	9791	(\$2,063.84)
12-6105-0-0000-0000-9791	6105	9791	(\$219.78)

CHK-RS-LOCAL-DEFINED - (Fatal) - All locally defined resource codes must roll up to a CDE defined resource code. **Passed**

SPECIAL-ED-GOAL - (Fatal) - Special Education revenue and expenditure transactions (resources 3300-3405, and 6500-6540, objects 1000-8999) must be coded to a Special Education 5000 goal or to Goal 7110, Nonagency-Educational. This technical review check excludes Early Intervening Services resources 3307, 3309, 3312, 3318, and 3332. **Passed**

GENERAL LEDGER CHECKS

CONTRIB-RESTR-REV - (Warning) - Contributions from Restricted Revenues (Object 8990) must net to zero by fund. **Passed**

CONTRIB-UNREST-REV - (Warning) - Contributions from Unrestricted Revenues (Object 8980) must net to zero by fund. **Passed**

EPA-CONTRIB - (Warning) - There should be no contributions (objects 8980-8999) to the Education Protection Account (Resource 1400). **Passed**

INTERFD-DIR-COST - (Warning) - Transfers of Direct Costs - Interfund (Object 5750) must net to zero for all funds. **Passed**

INTERFD-IN-OUT - (Warning) - Interfund Transfers In (objects 8910-8929) must equal Interfund Transfers Out (objects 7610-7629). **Passed**

INTERFD-INDIRECT - (Warning) - Transfers of Indirect Costs - Interfund (Object 7350) must net to zero for all funds. **Passed**

INTERFD-INDIRECT-FN - (Warning) - Transfers of Indirect Costs - Interfund (Object 7350) must net to zero by function. **Passed**

INTRAFFD-DIR-COST - (Warning) - Transfers of Direct Costs (Object 5710) must net to zero by fund. **Passed**

INTRAFFD-INDIRECT - (Warning) - Transfers of Indirect Costs (Object 7310) must net to zero by fund. **Passed**

INTRAFFD-INDIRECT-FN - (Warning) - Transfers of Indirect Costs (Object 7310) must net to zero by function. **Passed**

LCFF-TRANSFER - (Warning) - LCFF Transfers (objects 8091 and 8099) must net to zero, individually. **Passed**

LOTTERY-CONTRIB - (Warning) - There should be no contributions (objects 8980-8999) to the lottery (resources 1100 and 6300) or from the Lottery: Instructional Materials (Resource 6300). **Passed**

EXPORT VALIDATION CHECKS

CHK-DEPENDENCY - (Fatal) - If data has changed that affect other forms, the affected forms must be opened and saved. **Passed**

CHK-EXTRACTED-DATA-SOURCE - (Warning) - All forms that extract data from a prior reporting period use the same source extraction submission **Passed**

VERSION-CHECK - (Warning) - All versions are current. **Passed**

First Interim
Board Approved Operating Budget 2023-24
Technical Review Checks

Phase - All
Display - All Technical Checks

River Delta Joint Unified

Sacramento County

Following is a chart of the various types of technical review checks and related requirements:

F - Fatal (Data must be corrected; an explanation is not allowed)

W/WC - Warning/Warning with Calculation (If data are not correct, correct the data; if data are correct an explanation is required)

O - Informational (If data are not correct, correct the data; if data are correct an explanation is optional, but encouraged)

IMPORT CHECKS

CHECKFUNCTION - (Fatal) - All FUNCTION codes must be valid. **Passed**

CHECKFUND - (Fatal) - All FUND codes must be valid. **Passed**

CHECKGOAL - (Fatal) - All GOAL codes must be valid. **Passed**

CHECKOBJECT - (Fatal) - All OBJECT codes must be valid. **Passed**

CHECKRESOURCE - (Warning) - All RESOURCE codes must be valid. **Passed**

CHK-FDXRS7690xOB8590 - (Fatal) - Funds 19, 57, 63, 66, 67, and 73 with Object 8590, All Other State Revenue, must be used in combination with Resource 7690, STRS-On Behalf Pension Contributions. **Passed**

CHK-FUNCTIONxOBJECT - (Fatal) - All FUNCTION and OBJECT account code combinations must be valid. **Passed**

CHK-FUNDxFUNCTION-A - (Warning) - All FUND (funds 01 through 12, 19, 57, 62, and 73) and FUNCTION account code combinations should be valid. **Passed**

CHK-FUNDxFUNCTION-B - (Fatal) - All FUND (all funds except for 01 through 12, 19, 57, 62, and 73) and FUNCTION account code combinations must be valid. **Passed**

CHK-FUNDxGOAL - (Warning) - All FUND and GOAL account code combinations should be valid. **Passed**

CHK-FUNDxOBJECT - (Fatal) - All FUND and OBJECT account code combinations must be valid. **Passed**

CHK-FUNDxRESOURCE - (Warning) - All FUND and RESOURCE account code combinations should be valid. **Passed**

CHK-GOALxFUNCTION-A - (Fatal) - Goal and Function account code combinations (all goals with expenditure objects 1000-7999 in functions 1000-1999 and 4000-5999) must be valid. NOTE: Functions not included in the GOALxFUNCTION table (0000, 2000-3999, 6000-6999, 7100-7199, 7210, 8000-8999) are not checked and will pass the TRC. **Passed**

CHK-GOALxFUNCTION-B - (Fatal) - General administration costs (functions 7200-7999, except 7210) must be direct-charged to an Undistributed, Nonagency, or County Services to Districts goal (Goal 0000, 7100-7199, or 8600-8699). **Passed**

CHK-RES6500XOBJ8091 - (Fatal) - There is no activity in Resource 6500 (Special Education) with Object 8091 (LCFF Transfers-Current Year) or 8099 (LCFF/Revenue Limit Transfers-Prior Years).

Passed

CHK-RESOURCExOBJECTA - (Warning) - The following combinations for RESOURCE and OBJECT (objects 8000 through 9999, except for 9791, 9793, and 9795) are invalid. Data should be corrected or narrative must be provided explaining why the exception(s) should be considered appropriate.

Exception

ACCOUNT FD - RS - PY - GO - FN - OB	RESOURCE	OBJECT	VALUE
01-3212-0-0000-0000-9790	3212	9790	(\$44,968.94)
Explanation: beg balance still showing negative			
01-6690-0-0000-0000-9740	6690	9740	\$2,000.00
Explanation: beg balance still showing negative			
12-6105-0-0000-0000-9790	6105	9790	(\$219.78)
Explanation: due to GASB31			

CHK-RESOURCExOBJECTB - (Informational) - The following combinations for RESOURCE and OBJECT (objects 9791, 9793, and 9795) are invalid:

Exception

ACCOUNT FD - RS - PY - GO - FN - OB	RESOURCE	OBJECT	VALUE
01-3212-0-0000-0000-9791	3212	9791	(\$44,968.94)
01-3310-0-0000-0000-9791	3310	9791	(\$326,919.00)
01-3310-2-0000-0000-9791	3310	9791	\$326,919.00
01-3327-0-0000-0000-9791	3327	9791	(\$33,153.76)
01-3327-1-0000-0000-9791	3327	9791	\$11,605.76
01-3327-2-0000-0000-9791	3327	9791	\$21,548.00
01-6010-0-0000-0000-9791	6010	9791	\$180,113.55
01-6010-1-0000-0000-9791	6010	9791	(\$180,113.55)
01-6690-0-0000-0000-9791	6690	9791	\$2,000.00
01-7010-0-0000-0000-9791	7010	9791	\$2,063.84
01-7010-1-0000-0000-9791	7010	9791	(\$2,063.84)
12-6105-0-0000-0000-9791	6105	9791	(\$219.78)

CHK-RS-LOCAL-DEFINED - (Fatal) - All locally defined resource codes must roll up to a CDE defined resource code.

Passed

SPECIAL-ED-GOAL - (Fatal) - Special Education revenue and expenditure transactions (resources 3300-3405, and 6500-6540, objects 1000-8999) must be coded to a Special Education 5000 goal or to Goal 7110, Nonagency-Educational. This technical review check excludes Early Intervening Services resources 3307, 3309, 3312, 3318, and 3332.

Passed

GENERAL LEDGER CHECKS

CEFB-POSITIVE - (Warning) - Components of Ending Fund Balance/Net Position (objects 9700-9789, 9796, and 9797) must be positive individually by resource, by fund.

Passed

CONTRIB-RESTR-REV - (Warning) - Contributions from Restricted Revenues (Object 8990) must net to zero by fund.

Passed

CONTRIB-UNREST-REV - (Warning) - Contributions from Unrestricted Revenues (Object 8980) must net to zero by fund.

Passed

EFB-POSITIVE - (Warning) - Ending balance (Object 979Z) is negative for the following resources. Please explain the cause of the negative balances and your plan to resolve them.

Exception

FUND	RESOURCE	NEG. EFB
01	1400	(\$94,164.69)
Explanation: owe the state funds		
01	3212	(\$44,968.94)
Explanation: beg balance still showing negative		
01	6266	(\$8,339.36)
Explanation: beg balance still showing negative		
01	7412	(\$35,310.00)
Explanation: beg balance still showing negative		
01	7435	(\$333,301.25)
Explanation: beg balance still showing negative		
Total of negative resource balances for Fund 01		(\$516,084.24)
12	6105	(\$219.78)
Explanation: due to GASB31		
Total of negative resource balances for Fund 12		(\$219.78)

EPA-CONTRIB - (Warning) - There should be no contributions (objects 8980-8999) to the Education Protection Account (Resource 1400).

Passed

EXCESS-ASSIGN-REU - (Warning) - Amounts reported in Other Assignments (Object 9780) and/or Reserve for Economic Uncertainties (REU) (Object 9789) should not create a negative amount in Unassigned/Unappropriated (Object 9790) by fund and resource (for all funds except funds 61 through 95).

Passed

EXP-POSITIVE - (Warning) - Expenditure amounts (objects 1000-7999) should be positive by function, resource, and fund.

Passed

INTERFD-DIR-COST - (Warning) - Transfers of Direct Costs - Interfund (Object 5750) must net to zero for all funds.

Passed

INTERFD-IN-OUT - (Warning) - Interfund Transfers In (objects 8910-8929) must equal Interfund Transfers Out (objects 7610-7629).

Passed

INTERFD-INDIRECT - (Warning) - Transfers of Indirect Costs - Interfund (Object 7350) must net to zero for all funds.

Passed

INTERFD-INDIRECT-FN - (Warning) - Transfers of Indirect Costs - Interfund (Object 7350) must net to zero by function.

Passed

INTRA-FD-DIR-COST - (Warning) - Transfers of Direct Costs (Object 5710) must net to zero by fund.

Passed

INTRA-FD-INDIRECT - (Warning) - Transfers of Indirect Costs (Object 7310) must net to zero by fund.

Passed

INTRA-FD-INDIRECT-FN - (Warning) - Transfers of Indirect Costs (Object 7310) must net to zero by function.

Passed

LCFF-TRANSFER - (Warning) - LCFF Transfers (objects 8091 and 8099) must net to zero, individually.

Passed

LOTTERY-CONTRIB - (Warning) - There should be no contributions (objects 8980-8999) to the lottery (resources 1100 and 6300) or from the Lottery: Instructional Materials (Resource 6300).

Passed

OBJ-POSITIVE - (Warning) - The following objects have a negative balance by resource, by fund:

Exception

FUND	RESOURCE	OBJECT	VALUE
01	1400	9790	(\$94,164.69)
Explanation: owe the state			
01	3212	9790	(\$44,968.94)
Explanation: beg balance still showing negative			
01	6266	9790	(\$8,339.36)
Explanation: beg balance still showing negative			
01	7412	9790	(\$35,310.00)
Explanation: beg balance still showing negative			
01	7435	9790	(\$333,301.25)
Explanation: beg balance still showing negative			
12	6105	9790	(\$219.78)
Explanation: due to GASB 31			

PASS-THRU-REV=EXP - (Warning) - Pass-through revenues from all sources (objects 8287, 8587, and 8697) should equal transfers of pass-through revenues to other agencies (objects 7211 through 7213, plus 7299 for Resource 3327), by fund and resource.

Passed

REV-POSITIVE - (Warning) - Revenue amounts exclusive of contributions (objects 8000-8979) should be positive by resource, by fund.

Passed

RS-NET-POSITION-ZERO - (Fatal) - Restricted Net Position (Object 9797), in unrestricted resources, must be zero, by resource, in funds 61 through 95.

Passed

SE-PASS-THRU-REVENUE - (Warning) - Transfers of special education pass-through revenues are not reported in the general fund for the Administrative Unit of a Special Education Local Plan Area.

Passed

UNASSIGNED-NEGATIVE - (Fatal) - Unassigned/Unappropriated balance (Object 9790) must be zero or negative, by resource, in all funds except the general fund and funds 61 through 95.

Passed

UNR-NET-POSITION-NEG - (Fatal) - Unrestricted Net Position (Object 9790), in restricted resources, must be zero or negative, by resource, in funds 61 through 95.

Passed

EXPORT VALIDATION CHECKS

CHK-DEPENDENCY - (Fatal) - If data has changed that affect other forms, the affected forms must be opened and saved.

Passed

CHK-EXTRACTED-DATA-SOURCE - (Warning) - All forms that extract data from a prior reporting period use the same source extraction submission

Passed

VERSION-CHECK - (Warning) - All versions are current.

Passed

First Interim
Original Budget 2023-24
Technical Review Checks
Phase - All
Display - All Technical Checks

River Delta Joint Unified

Sacramento County

Following is a chart of the various types of technical review checks and related requirements:

F - Fatal (Data must be corrected; an explanation is not allowed)

WWC - Warning/Warning with Calculation (If data are not correct, correct the data; if data are correct an explanation is required)

O - Informational (If data are not correct, correct the data; if data are correct an explanation is optional, but encouraged)

IMPORT CHECKS

CHECKFUNCTION - (Fatal) - All FUNCTION codes must be valid. **Passed**

CHECKFUND - (Fatal) - All FUND codes must be valid. **Passed**

CHECKGOAL - (Fatal) - All GOAL codes must be valid. **Passed**

CHECKOBJECT - (Fatal) - All OBJECT codes must be valid. **Passed**

CHECKRESOURCE - (Warning) - All RESOURCE codes must be valid. **Passed**

CHK-FDXRS7690xOB8590 - (Fatal) - Funds 19, 57, 63, 66, 67, and 73 with Object 8590, All Other State Revenue, must be used in combination with Resource 7690, STRS-On Behalf Pension Contributions. **Passed**

CHK-FUNCTIONxOBJECT - (Fatal) - All FUNCTION and OBJECT account code combinations must be valid. **Passed**

CHK-FUNDxFUNCTION-A - (Warning) - All FUND (funds 01 through 12, 19, 57, 62, and 73) and FUNCTION account code combinations should be valid. **Passed**

CHK-FUNDxFUNCTION-B - (Fatal) - All FUND (all funds except for 01 through 12, 19, 57, 62, and 73) and FUNCTION account code combinations must be valid. **Passed**

CHK-FUNDxGOAL - (Warning) - All FUND and GOAL account code combinations should be valid. **Passed**

CHK-FUNDxOBJECT - (Fatal) - All FUND and OBJECT account code combinations must be valid. **Passed**

CHK-FUNDxRESOURCE - (Warning) - All FUND and RESOURCE account code combinations should be valid. **Passed**

CHK-GOALxFUNCTION-A - (Fatal) - Goal and Function account code combinations (all goals with expenditure objects 1000-7999 in functions 1000-1999 and 4000-5999) must be valid. NOTE: Functions not included in the GOALxFUNCTION table (0000, 2000-3999, 6000-6999, 7100-7199, 7210, 8000-8999) are not checked and will pass the TRC. **Passed**

CHK-GOALxFUNCTION-B - (Fatal) - General administration costs (functions 7200-7999, except 7210) must be direct-charged to an Undistributed, Nonagency, or County Services to Districts goal (Goal 0000, 7100-7199, or 8600-8699). **Passed**

CHK-RES6500XOBJ8091 - (Fatal) - There is no activity in Resource 6500 (Special Education) with Object 8091 (LCFF Transfers-Current Year) or 8099 (LCFF/Revenue Limit Transfers-Prior Years). **Passed**

CHK-RESOURCExOBJECTA - (Warning) - The following combinations for RESOURCE and OBJECT (objects 8000 through 9999, except for 9791, 9793, and 9795) are invalid. Data should be corrected or narrative must be provided explaining why the exception(s) should be considered appropriate. **Exception**

ACCOUNT FD - RS - PY - GO - FN - OB	RESOURCE	OBJECT	VALUE
01-3212-0-0000-0000-9790	3212	9790	(\$44,968.94)
Explanation: Transfer once done; however still showing a beg balance as negative			
01-6690-0-0000-0000-9740	6690	9740	\$2,000.00
Explanation: This was corrected; however still showing a negative beg balance			
12-6105-0-0000-0000-9790	6105	9790	(\$219.78)
Explanation: This is due to GASB 31 and was corrected.			

CHK-RESOURCExOBJECTB - (Informational) - The following combinations for RESOURCE and OBJECT (objects 9791, 9793, and 9795) are invalid. **Exception**

ACCOUNT FD - RS - PY - GO - FN - OB	RESOURCE	OBJECT	VALUE
01-3212-0-0000-0000-9791	3212	9791	(\$44,968.94)
01-3310-0-0000-0000-9791	3310	9791	(\$326,919.00)
01-3310-2-0000-0000-9791	3310	9791	\$326,919.00
01-3327-0-0000-0000-9791	3327	9791	(\$33,153.76)
01-3327-1-0000-0000-9791	3327	9791	\$11,605.76
01-3327-2-0000-0000-9791	3327	9791	\$21,548.00
01-6010-0-0000-0000-9791	6010	9791	\$180,113.55
01-6010-1-0000-0000-9791	6010	9791	(\$180,113.55)
01-6690-0-0000-0000-9791	6690	9791	\$2,000.00
01-7010-0-0000-0000-9791	7010	9791	\$2,063.84
01-7010-1-0000-0000-9791	7010	9791	(\$2,063.84)
12-6105-0-0000-0000-9791	6105	9791	(\$219.78)

CHK-RS-LOCAL-DEFINED - (Fatal) - All locally defined resource codes must roll up to a CDE defined resource code. **Passed**

SPECIAL-ED-GOAL - (Fatal) - Special Education revenue and expenditure transactions (resources 3300-3405, and 6500-6540, objects 1000-8999) must be coded to a Special Education 5000 goal or to Goal 7110, Nonagency-Educational. This technical review check excludes Early Intervening Services resources 3307, 3309, 3312, 3318, and 3332. **Passed**

GENERAL LEDGER CHECKS

CEFB-POSITIVE - (Fatal) - Components of Ending Fund Balance/Net Position (objects 9700-9789, 9796, and 9797) must be positive individually by resource, by fund. **Passed**

CONTRIB-RESTR-REV - (Fatal) - Contributions from Restricted Revenues (Object 8990) must net to zero by fund. **Passed**

CONTRIB-UNREST-REV - (Fatal) - Contributions from Unrestricted Revenues (Object 8980) must net to zero by fund. **Passed**

EFB-POSITIVE - (Warning) - Ending balance (Object 979Z) is negative for the following resources. Please explain the cause of the negative balances and your plan to resolve them.

Exception

FUND	RESOURCE	NEG. EFB
01	1400	(\$94,164.69)
Explanation: budgeted owing the state		
01	3212	(\$44,968.94)
Explanation: beg balance is still showing negative		
01	6266	(\$8,339.36)
Explanation: owed the state funds		
01	7412	(\$35,310.00)
Explanation: beg balance is showing negative		
01	7435	(\$333,301.25)
Explanation: beg balance is showing negative		
Total of negative resource balances for Fund 01		(\$516,084.24)
12	6105	(\$219.78)
Explanation: due to GASB31		
Total of negative resource balances for Fund 12		(\$219.78)

EPA-CONTRIB - (Fatal) - There should be no contributions (objects 8980-8999) to the Education Protection Account (Resource 1400).

Passed

EXCESS-ASSIGN-REU - (Fatal) - Amounts reported in Other Assignments (Object 9780) and/or Reserve for Economic Uncertainties (REU) (Object 9789) should not create a negative amount in Unassigned/Unappropriated (Object 9790) by fund and resource (for all funds except funds 61 through 95).

Passed

EXP-POSITIVE - (Warning) - Expenditure amounts (objects 1000-7999) should be positive by function, resource, and fund.

Passed

INTERFD-DIR-COST - (Warning) - Transfers of Direct Costs - Interfund (Object 5750) must net to zero for all funds.

Passed

INTERFD-IN-OUT - (Warning) - Interfund Transfers In (objects 8910-8929) must equal Interfund Transfers Out (objects 7610-7629).

Passed

INTERFD-INDIRECT - (Warning) - Transfers of Indirect Costs - Interfund (Object 7350) must net to zero for all funds.

Passed

INTERFD-INDIRECT-FN - (Warning) - Transfers of Indirect Costs - Interfund (Object 7350) must net to zero by function.

Passed

INTRA-FD-DIR-COST - (Fatal) - Transfers of Direct Costs (Object 5710) must net to zero by fund.

Passed

INTRA-FD-INDIRECT - (Fatal) - Transfers of Indirect Costs (Object 7310) must net to zero by fund.

Passed

INTRA-FD-INDIRECT-FN - (Fatal) - Transfers of Indirect Costs (Object 7310) must net to zero by function.

Passed

LCFF-TRANSFER - (Warning) - LCFF Transfers (objects 8091 and 8099) must net to zero, individually.

Passed

LOTTERY-CONTRIB - (Fatal) - There should be no contributions (objects 8980-8999) to the lottery (resources 1100 and 6300) or from the Lottery: Instructional Materials (Resource 6300).

Passed

OBJ-POSITIVE - (Warning) - The following objects have a negative balance by resource, by fund:

Exception

FUND	RESOURCE	OBJECT	VALUE
01	1400	9790	(\$94,164.69)
Explanation: budget owing the state			
01	3212	9790	(\$44,968.94)
Explanation: beg balance is still showing negative			
01	6266	9790	(\$8,339.36)
Explanation: beg balance is still showing negative			
01	7412	9790	(\$35,310.00)
Explanation: beg balance is still showing negative			
01	7435	9790	(\$333,301.25)
Explanation: beg balance is still showing negative			
12	6105	9790	(\$219.78)
Explanation: due to GASB 31			

PASS-THRU-REV=EXP - (Warning) - Pass-through revenues from all sources (objects 8287, 8587, and 8697) should equal transfers of pass-through revenues to other agencies (objects 7211 through 7213, plus 7299 for Resource 3327), by fund and resource.

Passed

REV-POSITIVE - (Warning) - Revenue amounts exclusive of contributions (objects 8000-8979) should be positive by resource, by fund.

Passed

RS-NET-POSITION-ZERO - (Fatal) - Restricted Net Position (Object 9797), in unrestricted resources, must be zero, by resource, in funds 61 through 95.

Passed

SE-PASS-THRU-REVENUE - (Warning) - Transfers of special education pass-through revenues are not reported in the general fund for the Administrative Unit of a Special Education Local Plan Area.

Passed

UNASSIGNED-NEGATIVE - (Fatal) - Unassigned/Unappropriated balance (Object 9790) must be zero or negative, by resource, in all funds except the general fund and funds 61 through 95.

Passed

UNR-NET-POSITION-NEG - (Fatal) - Unrestricted Net Position (Object 9790), in restricted resources, must be zero or negative, by resource, in funds 61 through 95.

Passed

EXPORT VALIDATION CHECKS

CHK-DEPENDENCY - (Fatal) - If data has changed that affect other forms, the affected forms must be opened and saved.

Passed

CHK-EXTRACTED-DATA-SOURCE - (Warning) - All forms that extract data from a prior reporting period use the same source extraction submission

Passed

VERSION-CHECK - (Warning) - All versions are current.

Passed

First Interim
Projected Totals 2023-24
Technical Review Checks
Phase - All
Display - All Technical Checks

River Delta Joint Unified

Sacramento County

Following is a chart of the various types of technical review checks and related requirements:

F - Fatal (Data must be corrected; an explanation is not allowed)

WWC - Warning/Warning with Calculation (If data are not correct, correct the data; if data are correct an explanation is required)

O - Informational (If data are not correct, correct the data; if data are correct an explanation is optional, but encouraged)

IMPORT CHECKS

CHECKFUNCTION - (Fatal) - All FUNCTION codes must be valid. **Passed**

CHECKFUND - (Fatal) - All FUND codes must be valid. **Passed**

CHECKGOAL - (Fatal) - All GOAL codes must be valid. **Passed**

CHECKOBJECT - (Fatal) - All OBJECT codes must be valid. **Passed**

CHECKRESOURCE - (Warning) - All RESOURCE codes must be valid. **Passed**

CHK-FDXRS7690xOB8590 - (Fatal) - Funds 19, 57, 63, 66, 67, and 73 with Object 8590, All Other State Revenue, must be used in combination with Resource 7690, STRS-On Behalf Pension Contributions. **Passed**

CHK-FUNCTIONxOBJECT - (Fatal) - All FUNCTION and OBJECT account code combinations must be valid. **Passed**

CHK-FUNDxFUNCTION-A - (Warning) - All FUND (funds 01 through 12, 19, 57, 62, and 73) and FUNCTION account code combinations should be valid. **Passed**

CHK-FUNDxFUNCTION-B - (Fatal) - All FUND (all funds except for 01 through 12, 19, 57, 62, and 73) and FUNCTION account code combinations must be valid. **Passed**

CHK-FUNDxGOAL - (Warning) - All FUND and GOAL account code combinations should be valid. **Passed**

CHK-FUNDxOBJECT - (Fatal) - All FUND and OBJECT account code combinations must be valid. **Passed**

CHK-FUNDxRESOURCE - (Warning) - All FUND and RESOURCE account code combinations should be valid. **Passed**

CHK-GOALxFUNCTION-A - (Fatal) - Goal and Function account code combinations (all goals with expenditure objects 1000-7999 in functions 1000-1999 and 4000-5999) must be valid. NOTE: Functions not included in the GOALxFUNCTION table (0000, 2000-3999, 6000-6999, 7100-7199, 7210, 8000-8999) are not checked and will pass the TRC. **Passed**

CHK-GOALxFUNCTION-B - (Fatal) - General administration costs (functions 7200-7999, except 7210) must be direct-charged to an Undistributed, Nonagency, or County Services to Districts goal (Goal 0000, 7100-7199, or 8600-8699). **Passed**

CHK-RES6500XOBJ8091 - (Fatal) - There is no activity in Resource 6500 (Special Education) with Object 8091 (LCFF Transfers-Current Year) or 8099 (LCFF/Revenue Limit Transfers-Prior Years). **Passed**

CHK-RESOURCExOBJECTA - (Warning) - All RESOURCE and OBJECT (objects 8000 through 9999, except for 9791, 9793, and 9795) account code combinations should be valid. **Passed**

CHK-RESOURCExOBJECTB - (Informational) - The following combinations for RESOURCE and OBJECT (objects 9791, 9793, and 9795) are invalid: **Exception**

ACCOUNT FD - RS - PY - GO - FN - OB	RESOURCE	OBJECT	VALUE
01-3212-0-0000-0000-9791	3212	9791	(\$44,968.94)
01-3310-0-0000-0000-9791	3310	9791	(\$326,919.00)
01-3310-2-0000-0000-9791	3310	9791	\$326,919.00
01-3327-0-0000-0000-9791	3327	9791	(\$33,153.76)
01-3327-1-0000-0000-9791	3327	9791	\$11,605.76
01-3327-2-0000-0000-9791	3327	9791	\$21,548.00
01-6010-0-0000-0000-9791	6010	9791	\$180,113.55
01-6010-1-0000-0000-9791	6010	9791	(\$180,113.55)
01-6690-0-0000-0000-9791	6690	9791	\$2,000.00
01-7010-0-0000-0000-9791	7010	9791	\$2,063.84
01-7010-1-0000-0000-9791	7010	9791	(\$2,063.84)
12-6105-0-0000-0000-9791	6105	9791	(\$219.78)

CHK-RS-LOCAL-DEFINED - (Fatal) - All locally defined resource codes must roll up to a CDE defined resource code. **Passed**

SPECIAL-ED-GOAL - (Fatal) - Special Education revenue and expenditure transactions (resources 3300-3405, and 6500-6540, objects 1000-8999) must be coded to a Special Education 5000 goal or to Goal 7110, Nonagency-Educational. This technical review check excludes Early Intervening Services resources 3307, 3309, 3312, 3318, and 3332. **Passed**

GENERAL LEDGER CHECKS

CEFB-POSITIVE - (Fatal) - Components of Ending Fund Balance/Net Position (objects 9700-9789, 9796, and 9797) must be positive individually by resource, by fund. **Passed**

CONTRIB-RESTR-REV - (Fatal) - Contributions from Restricted Revenues (Object 8990) must net to zero by fund. **Passed**

CONTRIB-UNREST-REV - (Fatal) - Contributions from Unrestricted Revenues (Object 8980) must net to zero by fund. **Passed**

EFB-POSITIVE - (Warning) - All ending fund balances (Object 979Z) should be positive by resource, by fund. **Passed**

EPA-CONTRIB - (Fatal) - There should be no contributions (objects 8980-8999) to the Education Protection Account (Resource 1400). **Passed**

EXCESS-ASSIGN-REU - (Fatal) - Amounts reported in Other Assignments (Object 9780) and/or Reserve for Economic Uncertainties (REU) (Object 9789) should not create a negative amount in Unassigned/Unappropriated (Object 9790) by fund and resource (for all funds except funds 61 through 95). **Passed**

EXP-POSITIVE - (Warning) - Expenditure amounts (objects 1000-7999) should be positive by function, resource, and fund. **Passed**

INTERFD-DIR-COST - (Warning) - Transfers of Direct Costs - Interfund (Object 5750) must net to zero for all funds. **Passed**

INTERFD-IN-OUT - (Warning) - Interfund Transfers In (objects 8910-8929) must equal Interfund Transfers Out (objects 7610-7629). **Passed**

INTERFD-INDIRECT - (Warning) - Transfers of Indirect Costs - Interfund (Object 7350) must net to zero for all funds. **Passed**

INTERFD-INDIRECT-FN - (Warning) - Transfers of Indirect Costs - Interfund (Object 7350) must net to zero by function. **Passed**

INTRA-FD-DIR-COST - (Fatal) - Transfers of Direct Costs (Object 5710) must net to zero by fund. **Passed**

INTRA-FD-INDIRECT - (Fatal) - Transfers of Indirect Costs (Object 7310) must net to zero by fund. **Passed**

INTRA-FD-INDIRECT-FN - (Fatal) - Transfers of Indirect Costs (Object 7310) must net to zero by function. **Passed**

LCFF-TRANSFER - (Warning) - LCFF Transfers (objects 8091 and 8099) must net to zero, individually. **Passed**

LOTTERY-CONTRIB - (Fatal) - There should be no contributions (objects 8980-8999) to the lottery (resources 1100 and 6300) or from the Lottery: Instructional Materials (Resource 6300). **Passed**

OBJ-POSITIVE - (Warning) - The following objects have a negative balance by resource, by fund: **Exception**

FUND	RESOURCE	OBJECT	VALUE
01	6230	8590	(\$9,630.00)
Explanation: Owed state funds back			

PASS-THRU-REV=EXP - (Warning) - Pass-through revenues from all sources (objects 8287, 8587, and 8697) should equal transfers of pass-through revenues to other agencies (objects 7211 through 7213, plus 7299 for Resource 3327), by fund and resource. **Passed**

REV-POSITIVE - (Warning) - In the following resources, total revenues exclusive of contributions (objects 8000-8979) are negative, by fund: **Exception**

FUND	RESOURCE	VALUE
01	6230	(\$9,630.00)
Explanation: Owed state funds back		

RS-NET-POSITION-ZERO - (Fatal) - Restricted Net Position (Object 9797), in unrestricted resources, must be zero, by resource, in funds 61 through 95. **Passed**

SE-PASS-THRU-REVENUE - (Warning) - Transfers of special education pass-through revenues are not reported in the general fund for the Administrative Unit of a Special Education Local Plan Area. **Passed**

UNASSIGNED-NEGATIVE - (Fatal) - Unassigned/Unappropriated balance (Object 9790) must be zero or negative, by resource, in all funds except the general fund and funds 61 through 95. **Passed**

UNR-NET-POSITION-NEG - (Fatal) - Unrestricted Net Position (Object 9790), in restricted resources, must be zero or negative, by resource, in funds 61 through 95. **Passed**

SUPPLEMENTAL CHECKS

CS-EXPLANATIONS - (Fatal) - Explanations must be provided in the Criteria and Standards Review (Form 01CSI) for all criteria and for supplemental information items S1 through S6, and S9 if applicable, where the standard has not been met or where the status is Not Met or Yes. **Passed**

CS-YES-NO - (Fatal) - Supplemental information items and additional fiscal indicator items in the Criteria and Standards Review (Form 01CSI) must be answered Yes or No, where applicable, for the form to be complete. **Passed**

EXPORT VALIDATION CHECKS

ADA-PROVIDE - (Fatal) - Average Daily Attendance data (Form AI) must be provided. **Passed**

CASHFLOW-PROVIDE - (Warning) - A Cashflow Worksheet (Form CASH) must be provided with your Interim reports. (Note: LEAs may use a cashflow worksheet other than Form CASH, as long as it provides a monthly cashflow projected through the end of the fiscal year.) **Passed**

CHK-DEPENDENCY - (Fatal) - If data has changed that affect other forms, the affected forms must be opened and saved. **Passed**

CHK-EXTRACTED-DATA-SOURCE - (Warning) - All forms that extract data from a prior reporting period use the same source extraction submission **Passed**

CHK-UNBALANCED-A - (Warning) - Unbalanced and/or incomplete data in any of the forms should be corrected before an official export is completed. **Passed**

CHK-UNBALANCED-B - (Fatal) - Unbalanced and/or incomplete data in any of the forms must be corrected before an official export is completed. **Passed**

CS-PROVIDE - (Fatal) - The Criteria and Standards Review (Form 01CSI) has been provided. **Passed**

FORM01-PROVIDE - (Fatal) - Form 01 (Form 01I) must be opened and saved. **Passed**

INTERIM-CERT-PROVIDE - (Fatal) - Interim Certification (Form CI) must be provided. **Passed**

MYP-PROVIDE - (Warning) - A Multiyear Projection Worksheet must be provided with your Interim. (Note: LEAs may use a multiyear projection worksheet other than Form MYP, with approval of their reviewing agency, as long as it provides current year and at least two subsequent fiscal years, and separately projects unrestricted resources, restricted resources, and combined total resources.) **Passed**

MYPIO-PROVIDE - (Warning) - A multiyear projection worksheet must be provided with your interim report for any fund projecting a negative balance at the end of the current fiscal year. (Note: LEAs may use a multiyear projection worksheet other than Form MYPIO, with approval of their reviewing agency.) **Passed**

VERSION-CHECK - (Warning) - All versions are current. **Passed**

NOTICE OF CRITERIA AND STANDARDS REVIEW. This interim report was based upon and reviewed using the state-adopted Criteria and Standards. (Pursuant to Education Code (EC) sections 33129 and 42130)

Signed: _____ Date: _____
District Superintendent or Designee

NOTICE OF INTERIM REVIEW. All action shall be taken on this report during a regular or authorized special meeting of the governing board.

To the County Superintendent of Schools:

This interim report and certification of financial condition are hereby filed by the governing board of the school district. (Pursuant to EC Section 42131)

Meeting Date: December 12, 2023 Signed: _____
President of the Governing Board

CERTIFICATION OF FINANCIAL CONDITION

- POSITIVE CERTIFICATION
As President of the Governing Board of this school district, I certify that based upon current projections this district will meet its financial obligations for the current fiscal year and subsequent two fiscal years.
- QUALIFIED CERTIFICATION
As President of the Governing Board of this school district, I certify that based upon current projections this district may not meet its financial obligations for the current fiscal year or two subsequent fiscal years.
- NEGATIVE CERTIFICATION
As President of the Governing Board of this school district, I certify that based upon current projections this district will be unable to meet its financial obligations for the remainder of the current fiscal year or for the subsequent fiscal year.

Contact person for additional information on the interim report:

Name: Tammy Busch Telephone: 707-374-1715
Title: Assistant Superintendent of Business Services E-mail: tbusch@rdsd.org

Criteria and Standards Review Summary

The following summary is automatically completed based on data provided in the Criteria and Standards Review form (Form 01CSI). Criteria and standards that are "Not Met," and supplemental information and additional fiscal indicators that are "Yes," may indicate areas of potential concern, which could affect the interim report certification, and should be carefully reviewed.

CRITERIA AND STANDARDS			Met	Not Met
1	Average Daily Attendance	Funded ADA for any of the current or two subsequent fiscal years has not changed by more than two percent since budget adoption.	X	
CRITERIA AND STANDARDS (continued)			Met	Not Met
2	Enrollment	Projected enrollment for any of the current or two subsequent fiscal years has not changed by more than two percent since budget adoption.		X
3	ADA to Enrollment	Projected second period (P-2) ADA to enrollment ratio for the current and two subsequent fiscal years is consistent with historical ratios.		X
4	Local Control Funding Formula (LCFF) Revenue	Projected LCFF revenue for any of the current or two subsequent fiscal years has not changed by more than two percent since budget adoption.		X
5	Salaries and Benefits	Projected ratio of total unrestricted salaries and benefits to total unrestricted general fund expenditures has not changed by more than the standard for the current and two subsequent fiscal years.	X	
6a	Other Revenues	Projected operating revenues (federal, other state, other local) for the current and two subsequent fiscal years have not changed by more than five percent since budget adoption.		X
6b	Other Expenditures	Projected operating expenditures (books and supplies, services and other expenditures) for the current and two subsequent fiscal years have not changed by more than five percent since budget adoption.		X
7	Ongoing and Major Maintenance Account	If applicable, changes occurring since budget adoption meet the required contribution to the ongoing and major maintenance account (i.e., restricted maintenance account).	X	
8	Deficit Spending	Unrestricted deficit spending, if any, has not exceeded the standard in any of the current or two subsequent fiscal years.		X
9a	Fund Balance	Projected general fund balance will be positive at the end of the current and two subsequent fiscal years.	X	
9b	Cash Balance	Projected general fund cash balance will be positive at the end of the current fiscal year.	X	
10	Reserves	Available reserves (e.g., reserve for economic uncertainties, unassigned/unappropriated amounts) meet minimum requirements for the current and two subsequent fiscal years.	X	
SUPPLEMENTAL INFORMATION			No	Yes
S1	Contingent Liabilities	Have any known or contingent liabilities (e.g., financial or program audits, litigation, state compliance reviews) occurred since budget adoption that may impact the budget?	X	

**First Interim
DISTRICT CERTIFICATION OF INTERIM REPORT
For the Fiscal Year 2023-24**

S2	Using One-time Revenues to Fund Ongoing Expenditures	Are there ongoing general fund expenditures funded with one-time revenues that have changed since budget adoption by more than five percent?	X	
S3	Temporary Interfund Borrowings	Are there projected temporary borrowings between funds?	X	
S4	Contingent Revenues	Are any projected revenues for any of the current or two subsequent fiscal years contingent on reauthorization by the local government, special legislation, or other definitive act (e.g., parcel taxes, forest reserves)?	X	
S5	Contributions	Have contributions from unrestricted to restricted resources, or transfers to or from the general fund to cover operating deficits, changed since budget adoption by more than \$20,000 and more than 5% for any of the current or two subsequent fiscal years?	X	
SUPPLEMENTAL INFORMATION (continued)			No	Yes
S6	Long-term Commitments	Does the district have long-term (multiyear) commitments or debt agreements?		X
		• If yes, have annual payments for the current or two subsequent fiscal years increased over prior year's (2022-23) annual payment?	X	
		• If yes, will funding sources used to pay long-term commitments decrease or expire prior to the end of the commitment period, or are they one-time sources?	X	
S7a	Postemployment Benefits Other than Pensions	Does the district provide postemployment benefits other than pensions (OPEB)?		X
		• If yes, have there been changes since budget adoption in OPEB liabilities?	X	
S7b	Other Self-insurance Benefits	Does the district operate any self-insurance programs (e.g., workers' compensation)?	X	
		• If yes, have there been changes since budget adoption in self-insurance liabilities?	n/a	
S8	Status of Labor Agreements	As of first interim projections, are salary and benefit negotiations still unsettled for:		
		• Certificated? (Section S8A, Line 1b)	X	
		• Classified? (Section S8B, Line 1b)	X	
S8	Labor Agreement Budget Revisions	For negotiations settled since budget adoption, per Government Code Section 3547.5(c), are budget revisions still needed to meet the costs of the collective bargaining agreement(s) for:		
		• Certificated? (Section S8A, Line 3)	X	
		• Classified? (Section S8B, Line 3)	X	
S9	Status of Other Funds	Are any funds other than the general fund projected to have a negative fund balance at the end of the current fiscal year?	X	
ADDITIONAL FISCAL INDICATORS			No	Yes
A1	Negative Cash Flow	Do cash flow projections show that the district will end the current fiscal year with a negative cash balance in the general fund?	X	
A2	Independent Position Control	Is personnel position control independent from the payroll system?	X	
A3	Declining Enrollment	Is enrollment decreasing in both the prior and current fiscal years?		X
A4	New Charter Schools Impacting District Enrollment	Are any new charter schools operating in district boundaries that are impacting the district's enrollment, either in the prior or current fiscal year?	X	
A5	Salary Increases Exceed COLA	Has the district entered into a bargaining agreement where any of the current or subsequent fiscal years of the agreement would result in salary increases that are expected to exceed the projected state funded cost-of-living adjustment?	X	
A6	Uncapped Health Benefits	Does the district provide uncapped (100% employer paid) health benefits for current or retired employees?	X	
A7	Independent Financial System	Is the district's financial system independent from the county office system?	X	
A8	Fiscal Distress Reports	Does the district have any reports that indicate fiscal distress? If yes, provide copies to the COE, pursuant to EC 42127.6(a).	X	
A9	Change of CBO or Superintendent	Have there been personnel changes in the superintendent or chief business official (CBO) positions within the last 12 months?	X	

BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT

445 Montezuma Street
Rio Vista, California 9457-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: X

From: Codi Agan, Director of Personnel

Item Number: 15

Type of item: (Action, Consent Action or Information Only): Action

SUBJECT:

Request to Approve the Administrative Job Descriptions for Secondary Principal, Elementary Principal, Vice Principal, Director of Personnel, Executive Assistant to the Superintendent and Board of Trustees

BACKGROUND:

The District has been working to review and revise job descriptions to align the descriptions to the duties of the positions. Many of these job descriptions are approximately thirty years old.

STATUS:

The District brings the following job descriptions to the Board for approval and adoption.

- Elementary Principal
- Vice Principal
- Director of Personnel
- Secondary Principal
- Executive Assistant to the Superintendent and Board of Trustees

PRESENTER:

Katherine Wright, Superintendent

OTHER PEOPLE WHO MIGHT BE PRESENT:

Staff

COST AND FUNDING SOURCES:

RECOMMENDATION:

That the Board approves the River Delta Unified School District Job Description Revisions as submitted.

Time allocated: 5 minutes

RIVER DELTA UNIFIED SCHOOL DISTRICT
SECONDARY PRINCIPAL

Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are not intended to reflect all duties performed within the job.

DEFINITION

To serve as instructional leader and chief executive of the school; to assume responsibility for the administration of school and ~~district initiated~~district-initiated programs involving curriculum, budget, operations, guidance, student and staff; to coordinate assigned activities with other school sites, the District Office and the community; and to provide highly responsible and complex administrative support to the Superintendent.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from the Superintendent.

Exercises direct supervision over certified and classified employees.

~~**DUTIES ESSENTIAL AND MARGINAL FUNCTION STATEMENTS**~~ *Essential and other important responsibilities and duties may include, but are not limited to, the following:*

Essential Functions:

1. Analyze data to inform decisions and improve outcomes.
- ~~1.2.~~ Assume responsibility for administering, ~~directing and~~directing and managing school and district-initiated programs involving curriculum, budget, operations guidance, ~~students~~students, and staff.
- ~~2.3.~~ Manage the development and implementation of goals, objectives, ~~policies~~policies, and manage priorities of the school.
- ~~3.4.~~ Establish, within District policy, appropriate ~~services~~services, and staffing levels; monitor and evaluate the efficiency and effectiveness of service delivery methods and procedures; allocate resources accordingly.
- ~~4.5.~~ Participate in the development and implementation of the district-~~approved~~ curriculum programs; provide, assign, and coordinate in-service training for staff to ensure uniform implementation.
- ~~5.6.~~ Select, train, motivate, and evaluate personnel; ~~provide or coordinate staff training~~; work with employees to correct work related deficiencies; implement discipline and termination procedures.
- ~~6.7.~~ Plan, manage, and supervise school business operations; administer budget within the district guidelines, policies, and procedures; monitor and approved expenditures.
8. Develop and administer school plans and organizational procedures, including student, staff, parent, and community -activities and discipline ~~procedures~~procedures.
9. ~~;~~Promote a healthy and safe student learning environment.~~;~~
- ~~7.10.~~ ensure compliance with established District policies and procedures.
11. Plan, coordinate and evaluate the total program of pupil services, including guidance and counseling; participate in a variety of meetings monitoring student academics and behaviors including IEP ~~and~~ Student Study Teams, and 504's.
- ~~8.12.~~ Provide direction and lead staff in the development of a compliant Master Schedule and meet all timelines set forth by the district as it relates to the Master Schedule.

- 9.13. Oversee and direct the use of curriculum materials, instructional supplies, equipment, building facilities, school grounds and community resources; review and approve/deny request use of school facilities.
 - 10.14. Represent the school to the District Office, outside agencies, and the community; maintain effective community relations through frequent and effective public relations campaigns.
 - 11.15. Maintain effective communication with parents; provide information of new policies and procedures in the District; meet with parents review student progress of behavior problems as appropriate.
 16. May assume responsibility for a special program; program, research research, and coordinate program activities.
 - 12.17. Oversee extra-curricular activities.
 - 13.18. Attend and participate in professional group meetings; stay abreast of new trends and innovations in school curriculum and education administration.
 19. Respond to and resolve difficult and sensitive inquiries and complaints from parents and generalthe general community.
 20. Meet with parents review student progress of behavior problems as appropriate, maintain high standard of student conduct and enforce discipline as necessary, according to education code.
 21. Operate a computer and other office equipment as assigned.
 22. Assure the health, safety, and welfare of students.
 23. Prepare and maintain a variety of District, County, State and federally mandated records and reports regarding student attendance, discipline, cumulative records, and academic achievement.
 24. Confer with students, parents, teachers, law enforcement officers, and representatives of social welfare agencies to resolve individual pupil academic, mental, social, and behavioral problems.
 25. Serve as a supportive representative of the District Admin Team for all District decisions, policies, procedures, protocols.
- 14.

Marginal Functions:

1. Perform related duties as assigned. Perform related duties and responsibilities as required.

QUALIFICATIONS

Knowledge of:

Operations, ~~servieesservices~~, and activities of a public school.
Principles, theories, practices, methods, and techniques used in curriculum development and classroom instruction.
~~Curriculum-~~
Classroom procedures which promote appropriate student conduct and motivation for student learning.
Child guidance principles and practices.
School improvement goals, objectives, and programs.
State academic report requirements applicable to the school site.
Current trends and research concerning the growth and development of school-age students.
Standardized student testing requirements.
 Standard and alternative learning theories.
 Instructional ~~standards and faculty requirements. techniques-~~

School law administration, applicable sections of the State Education Code and other applicable laws codes, and regulations under federal, state, and local.

Management skills to analyze programs, ~~policies~~policies, and operational needs.

Principles and practices of program development and administration.

Principles and practices of budget administration and monitoring.

Principles and practices of supervision, ~~training~~training, and performance evaluation.

~~Pertinent Federal, State and local laws, codes and regulations.~~

Education CodesBoard and District policies, procedures, and regulations.

Interpersonal skills using tact, patience, and courtesy.

Research methods and report writing techniques.

Oral and written communication skills.

Maintain confidentiality.

Basic computer operation and student information systems.

Ability to:

Admire and support youth even through adversity.

Plan, organize, direct, and coordinate the work of certificated and classified staff.

Select, supervise, ~~train~~train, and evaluate staff.

Delegate authority and responsibility.

Lead and direct the operations, services, and activities of the assigned school.

Identify and respond to community and District issues, ~~concerns~~concerns, and needs.

Develop and administer District and school goals, ~~objectives~~objectives, and procedures.

Prepare clear and concise reports.

Administer and monitor school budgets.

Analyze problems, identify alternative solutions, project consequences of proposed actions and implement recommendations in support of goals.

Research, analyze and evaluate new instructional methods and techniques.

Communicate clearly and concisely, both orally and in writing.

Establish and maintain effective working relationships with those contacted in the course of work.

Maintain effective audio-visual discrimination and perception needed for successful job performance.

Maintain mental capacity which allows the capability of making sound decisions and demonstrating intellectual capabilities.

Read, interpret, apply, and explain rules, regulations, policies, and procedures.

Maintain consistent, punctual, and regular attendance.

Maintaining emotional stability and self-control under pressure, challenge, or adversity.

Present self as a positive representative of the school district.

EXPERIENCE AND TRAINING GUIDELINES

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Experience:

Five years of ~~responsible-successful~~ teaching experience, including ~~two-four~~ years school site ~~of~~ administrative and supervisory responsibility.

Training:

Equivalent to a Master's Degree from an accredited college or university with major course work in education, education administration, social work, or ~~an education~~ related field. Bilingual, oral and written (Spanish), preferred, ~~not accredited~~ but is not required.

License or Certificate:

Possession of a valid California Teaching or other related Credential.

Valid California Administrative Credential.

Valid California Class C driver's license.

~~Possession of an Administrative Services Credential issued by the State of California.~~

WORKING CONDITIONS:

Environmental Conditions:

Office and school environment.

Constant interruptions.

Driving a vehicle to conduct work.

Physical Conditions:

Essential and marginal functions may require maintaining physical condition necessary for sustained posture in a seated and in a standing position for extended periods of time.

Hear and speak to exchange information and make presentations.

Move hands and fingers to operate a computer keyboard.

Bend at the waist, kneel or crouch.

See to monitor students and read a variety of materials.

;

JOB PROFILE:.

Annual Contract: 204-224 days

Salary: Administrative Salary Schedule

**RIVER DELTA UNIFIED SCHOOL DISTRICT
SECONDARY PRINCIPAL**

DEFINITION

To serve as instructional leader and chief executive of the school; to assume responsibility for the administration of school and district-initiated programs involving curriculum, budget, operations, guidance, student and staff; to coordinate assigned activities with other school sites, the District Office and the community; and to provide highly responsible and complex administrative support to the Superintendent.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from the Superintendent.

Exercises direct supervision over certified and classified employees.

DUTIES

Essential Functions:

1. Analyze data to inform decisions and improve outcomes.
2. Assume responsibility for administering, directing and managing school and district-initiated programs involving curriculum, budget, operations guidance, students, and staff.
3. Manage the development and implementation of goals, objectives, policies, and manage priorities of the school.
4. Establish, within District policy, appropriate services, and staffing levels; monitor and evaluate the efficiency and effectiveness of service delivery methods and procedures; allocate resources accordingly.
5. Participate in the development and implementation of the district-approved curriculum programs; provide, assign, and coordinate in-service training for staff to ensure uniform implementation.
6. Select, train, motivate, and evaluate personnel; work with employees to correct work related deficiencies; implement discipline and termination procedures.
7. Plan, manage, and supervise school business operations; administer budget within the district guidelines, policies, and procedures; monitor and approved expenditures.
8. Develop and administer school plans and organizational procedures, including student, staff, parent, and community activities and discipline procedures.
9. Promote a healthy and safe student learning environment.
10. Ensure compliance with established District policies and procedures.
11. Plan, coordinate and evaluate the total program of pupil services, including guidance and counseling; participate in a variety of meetings monitoring student academics and behaviors including IEP, Student Study Teams, and 504's.
12. Provide direction and lead staff in the development of a compliant Master Schedule and meet all timelines set forth by the district as it relates to the Master Schedule.
13. Oversee and direct the use of curriculum materials, instructional supplies, equipment, building facilities, school grounds and community resources; review and approve/deny request use of school facilities.

14. Represent the school to the District Office, outside agencies, and the community; maintain effective community relations through frequent and effective public relations campaigns.
15. Maintain effective communication with parents; provide information of new policies and procedures in the District.
16. May assume responsibility for a special program, research, and coordinate program activities.
17. Oversee extra-curricular activities.
18. Attend and participate in professional group meetings; stay abreast of new trends and innovations in school curriculum and education administration.
19. Respond to and resolve difficult and sensitive inquiries and complaints from parents and the general community.
20. Meet with parents, review student progress of behavior problems as appropriate, maintain high standard of student conduct and enforce discipline as necessary, according to education code.
21. Operate a computer and other office equipment as assigned.
22. Assure the health, safety, and welfare of students.
23. Prepare and maintain a variety of District, County, State and federally mandated records and reports regarding student attendance, discipline, cumulative records, and academic achievement.
24. Confer with students, parents, teachers, law enforcement officers, and representatives of social welfare agencies to resolve individual pupil academic, mental, social, and behavioral problems.
25. Serve as a supportive representative of the District Admin Team for all District decisions, policies, procedures, protocols.

Marginal Functions:

Perform related duties as assigned.

QUALIFICATIONS

Knowledge of:

Operations, services, and activities of a public school.

Principles, theories, practices, methods, and techniques used in curriculum development and classroom instruction.

Classroom procedures which promote appropriate student conduct and motivation for student learning.

Child guidance principles and practices.

School improvement goals, objectives, and programs.

State academic report requirements applicable to the school site.

Current trends and research concerning the growth and development of school-age students.

Standardized student testing requirements.

Standard and alternative learning theories.

Instructional standards and faculty requirements.

School law administration, applicable sections of the State Education Code and other applicable laws codes, and regulations under federal, state, and local.

Management skills to analyze programs, policies, and operational needs.

Principles and practices of program development and administration.

Principles and practices of budget administration and monitoring.

Principles and practices of supervision, training, and performance evaluation.

Board and District policies, procedures, and regulations.
Interpersonal skills using tact, patience, and courtesy.
Research methods and report writing techniques.
Oral and written communication skills.
Maintain confidentiality.
Basic computer operation and student information systems.

Ability to:

Admire and support youth even through adversity.
Plan, organize, direct, and coordinate the work of certificated and classified staff.
Select, supervise, train, and evaluate staff.
Delegate authority and responsibility.
Lead and direct the operations, services, and activities of the assigned school.
Identify and respond to community and District issues, concerns, and needs.
Develop and administer District and school goals, objectives, and procedures.
Prepare clear and concise reports.
Administer and monitor school budgets.
Analyze problems, identify alternative solutions, project consequences of proposed actions and implement recommendations in support of goals.
Research, analyze and evaluate new instructional methods and techniques.
Communicate clearly and concisely, both orally and in writing.
Establish and maintain effective working relationships with those contacted in the course of work.
Maintain effective audio-visual discrimination and perception needed for successful job performance.
Maintain mental capacity which allows the capability of making sound decisions and demonstrating intellectual capabilities.
Read, interpret, apply, and explain rules, regulations, policies, and procedures.
Maintain consistent, punctual, and regular attendance.
Maintaining emotional stability and self-control under pressure, challenge, or adversity.
Present self as a positive representative of the school district.

EXPERIENCE AND TRAINING GUIDELINES

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Experience:

Five years of successful teaching experience, including four years of school site administrative and supervisory responsibility.

Training:

Equivalent to a Master's Degree from an accredited college or university with major course work in education, education administration, social work, or an education related field. Bilingual, oral and written (Spanish), preferred, but is not required.

License or Certificate:

Possession of a valid California Teaching or other related Credential.
Valid California Administrative Credential.
Valid California Class C driver's license.

WORKING CONDITIONS:

Environmental Conditions:

Office and school environment.
Constant interruptions.
Driving a vehicle to conduct work.

Physical Conditions:

Essential and marginal functions may require maintaining physical condition necessary for sustained posture in a seated and in a standing position for extended periods of time.
Hear and speak to exchange information and make presentations.
Move hands and fingers to operate a computer keyboard.
Bend at the waist, kneel or crouch.
See to monitor students and read a variety of materials.

JOB PROFILE:

Annual Contract: 204 - 224 days
Salary: Administrative Salary Schedule

RIVER DELTA UNIFIED SCHOOL DISTRICT
ELEMENTARY PRINCIPAL

Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are not intended to reflect all duties performed within the job.

DEFINITION

To serve as instructional leader and chief executive of the school; to assume responsibility for the administration of school and ~~district initiated~~district-initiated programs involving curriculum, budget, operations, guidance, student and staff; to coordinate assigned activities with other school sites, the District Office and the community; and to provide highly responsible and complex administrative support to the Superintendent.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from the Superintendent.

Exercises direct supervision over certified and classified employees.

DUTIES ESSENTIAL AND MARGINAL FUNCTION STATEMENTS *Essential and other important responsibilities and duties may include, but are not limited to, the following:*

Essential Functions:

1. Analyze data to inform decisions and improve outcomes.
- ~~1.2.~~ Assume responsibility for administering, ~~directing and~~directing and managing school and district-initiated programs involving curriculum, budget, operations guidance, ~~students~~students, and staff.
- ~~2.3.~~ Manage the development and implementation of goals, objectives, ~~policies~~policies, and manage priorities of the school.
- ~~3.4.~~ Establish, within District policy, appropriate ~~services~~services, and staffing levels; monitor and evaluate the efficiency and effectiveness of service delivery methods and procedures; allocate resources accordingly.
- ~~4.5.~~ Participate in the development and implementation of the district--approved curriculum programs; provide, assign, and coordinate in-service training for staff to ensure uniform implementation.
- ~~5.6.~~ Select, train, motivate, and evaluate personnel; ~~provide or coordinate staff training;~~ work with employees to correct work related deficiencies; implement discipline and termination procedures.
- ~~6.7.~~ Plan, manage, and supervise school business operations; administer budget within the district guidelines, policies, and procedures; monitor and approved expenditures.
8. Develop and administer school plans and organizational procedures, including student, staff, parent and community activities and discipline procedures.
9. ~~P~~ Promote a healthy and safe student learning environment.
- ~~7.10.~~ ~~e~~ Ensure compliance with established District policies and procedures.
11. Plan, coordinate and evaluate the total program of pupil services, including guidance and counseling; participate in a variety of meetings monitoring student academics and behaviors including IEP, ~~and~~ Student Study Teams, and 504's.
12. Provide direction and lead staff in the development of compliant class rosters and meet all timelines set forth by the district as it relates to the class rosters.

- ~~9.13.~~ Oversee and direct the use of curriculum materials, instructional supplies, equipment, building facilities, school grounds and community resources; **review and approve/deny request for** use of school facilities.
- ~~10.14.~~ Represent the school to the District Office, outside **agencies/agencies**, and the community; maintain effective community relations **through frequent and effective public relations -campaigns**.
- ~~11.15.~~ Maintain effective communication with parents; provide information of new policies and procedures in the District; **meet with parents review student progress of behavior problems as appropriate.**
- ~~16.~~ May assume responsibility for a special **program;program, research/research**, and coordinate program activities.
- ~~12.17.~~ Oversee extra-curricular activities.
- ~~13.18.~~ Attend and participate in professional group meetings; stay abreast of new trends and innovations in school curriculum and education administration.
- ~~19.~~ Respond to and resolve difficult and sensitive inquiries and complaints from parents and **general/the general** community.
- ~~20.~~ Meet with parents review student progress of behavior problems as appropriate, maintain high standard of student conduct and enforce discipline as necessary, according to education code.
- ~~21.~~ Operate a computer and other office equipment as assigned.
- ~~22.~~ Assure the health, safety, and welfare of students.
- ~~23.~~ Prepare and maintain a variety of District, County, State and federally mandated records and reports regarding student attendance, discipline, cumulative records, and academic achievement.
- ~~24.~~ Confer with students, parents, teachers, law enforcement officers, and representatives of social welfare agencies to resolve individual pupil academic, mental, social, and behavioral problems.
- ~~25.~~ Serve as a supportive representative of the District Admin Team for all District decisions, policies, procedures, protocols.

~~14.~~

Marginal Functions:

- ~~1.—Perform related duties as assigned.~~Perform related duties and responsibilities as required.

QUALIFICATIONS

Knowledge of:

Operations, ~~servicesservices~~, and activities of a public school.

Principles, theories, practices, methods, and techniques used in curriculum development and classroom instruction.

~~Curriculum-~~

Classroom procedures which promote appropriate student conduct and motivation for student learning.

Child guidance principles and practices.

School improvement goals, objectives, and programs.

State academic report requirements applicable to the school site.

Current trends and research concerning the growth and development of school-age students.

Standardized student testing requirements.

Standard and alternative learning theories.

Instructional standards and faculty requirements.techniques.

School law administration, applicable sections of the State Education Code and other applicable laws codes, and regulations under federal, state, and local.

Management skills to analyze programs, ~~policies~~policies, and operational needs.

Principles and practices of program development and administration.

Principles and practices of budget administration and monitoring.

Principles and practices of supervision, ~~training~~training, and performance evaluation.

~~Pertinent Federal, State and local laws, codes and regulations.~~

Education Codes Board and District policies, procedures, and regulations.

Interpersonal skills using tact, patience, and courtesy.

Research methods and report writing techniques.

Oral and written communication skills.

Maintain confidentiality.

Basic computer operation and student information systems.

Ability to:

Admire and support youth even through adversity.

Plan, organize, direct, and coordinate the work of certificated and classified staff.

Select, supervise, ~~train~~train, and evaluate staff.

Delegate authority and responsibility.

Lead and direct the operations, services, and activities of the assigned school.

Identify and respond to community and District issues, ~~concerns~~concerns, and needs.

Develop and administer District and school goals, ~~objectives~~objectives, and procedures.

Prepare clear and concise reports.

Administer and monitor school budgets.

Analyze problems, identify alternative solutions, project consequences of proposed actions and implement recommendations in support of goals.

Research, analyze and evaluate new instructional methods and techniques.

Communicate clearly and concisely, both orally and in writing.

Establish and maintain effective working relationships with those contacted in the course of work.

Maintain effective audio-visual discrimination and perception needed for successful job performance.

Maintain mental capacity which allows the capability of making sound decisions and demonstrating intellectual capabilities.

Read, interpret, apply, and explain rules, regulations, policies, and procedures.

Maintain consistent, punctual, and regular attendance.

Maintaining emotional stability and self-control under pressure, challenge, or adversity.

Present self as a positive representative of the school district.

EXPERIENCE AND TRAINING GUIDELINES

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Experience:

Five years of successful~~responsible~~ teaching experience, including two years of school site administrative and supervisory responsibility.

Training:

Equivalent to a Master's Degree from an accredited college or university with major course work in education, education administration, social work, or an education related field. Bilingual, oral and written (Spanish), preferred, but not required, ~~not accredited~~.

License or Certificate:

Possession of a valid California Teaching or other related Credential.

Valid California Administrative Credential.

Valid California Class C driver's license.

~~Possession of an Administrative Services Credential issued by the State of California.~~

WORKING CONDITIONS:

Environmental Conditions:

Office and school environment.

Constant interruptions.

Driving a vehicle to conduct work.

Physical Conditions:

Essential and marginal functions may require maintaining physical condition necessary for sustained posture in a seated and in a standing position for extended periods of time.

Hear and speak to exchange information and make presentations.

Move hands and fingers to operate a computer keyboard.

Bend at the waist, kneel or crouch.

See to monitor students and read a variety of materials.

;

JOB PROFILE:

Annual Contract: 204-224 days

Salary: Administrative Salary Schedule

**RIVER DELTA UNIFIED SCHOOL DISTRICT
ELEMENTARY PRINCIPAL**

DEFINITION

To serve as instructional leader and chief executive of the school; to assume responsibility for the administration of school and district-initiated programs involving curriculum, budget, operations, guidance, student, and staff; to coordinate assigned activities with other school sites, the District Office and the community; and to provide highly responsible and complex administrative support to the Superintendent.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from the Superintendent.

Exercises direct supervision over certified and classified employees.

DUTIES

Essential Functions:

1. Analyze data to inform decisions and improve outcomes.
2. Assume responsibility for administering, directing, and managing school and district-initiated programs involving curriculum, budget, operations guidance, students, and staff.
3. Manage the development and implementation of goals, objectives, policies, and manage priorities of the school.
4. Establish, within District policy, appropriate services, and staffing levels; monitor and evaluate the efficiency and effectiveness of service delivery methods and procedures; allocate resources accordingly.
5. Participate in the development and implementation of the district-approved curriculum programs; provide, assign, and coordinate in-service training for staff to ensure uniform implementation.
6. Select, train, motivate, and evaluate personnel; work with employees to correct work related deficiencies; implement discipline and termination procedures.
7. Plan, manage, and supervise school business operations; administer budget within the district guidelines, policies, and procedures; monitor and approved expenditures.
8. Develop and administer school plans and organizational procedures, including student, staff, parent and community activities and discipline procedures.
9. Promote a healthy and safe student learning environment.
10. Ensure compliance with established District policies and procedures.
11. Plan, coordinate and evaluate the total program of pupil services, including guidance and counseling; participate in a variety of meetings monitoring student academics and behaviors including IEP, Student Study Teams, and 504's.
12. Provide direction and lead staff in the development of compliant class rosters and meet all timelines set forth by the district as it relates to the class rosters.
13. Oversee and direct the use of curriculum materials, instructional supplies, equipment, building facilities, school grounds and community resources; review and approve/deny request for use of school facilities.
14. Represent the school to the District Office, outside agencies, and the community; maintain effective community relations through frequent and effective public relations campaigns.
15. Maintain effective communication with parents; provide information of new policies and procedures in the District.

16. May assume responsibility for a special program, research, and coordinate program activities.
17. Oversee extra-curricular activities.
18. Attend and participate in professional group meetings; stay abreast of new trends and innovations in school curriculum and education administration.
19. Respond to and resolve difficult and sensitive inquiries and complaints from parents and the general community.
20. Meet with parents, review student progress of behavior problems as appropriate, maintain high standard of student conduct and enforce discipline as necessary, according to education code.
21. Operate a computer and other office equipment as assigned.
22. Assure the health, safety, and welfare of students.
23. Prepare and maintain a variety of District, County, State and federally mandated records and reports regarding student attendance, discipline, cumulative records, and academic achievement.
24. Confer with students, parents, teachers, law enforcement officers, and representatives of social welfare agencies to resolve individual pupil academic, mental, social, and behavioral problems.
25. Serve as a supportive representative of the District Admin Team for all District decisions, policies, procedures, protocols.

Marginal Functions:

Perform related duties as assigned.

QUALIFICATIONS

Knowledge of:

Operations, services, and activities of a public school.
Principles, theories, practices, methods, and techniques used in curriculum development and classroom instruction.
Classroom procedures which promote appropriate student conduct and motivation for student learning.
Child guidance principles and practices.
School improvement goals, objectives, and programs.
State academic report requirements applicable to the school site.
Current trends and research concerning the growth and development of school-age students.
Standardized student testing requirements.
Standard and alternative learning theories.
Instructional standards and faculty requirements.
School law administration, applicable sections of the State Education Code and other applicable laws codes, and regulations under federal, state, and local.
Management skills to analyze programs, policies, and operational needs.
Principles and practices of program development and administration.
Principles and practices of budget administration and monitoring.
Principles and practices of supervision, training, and performance evaluation.
Board and District policies, procedures, and regulations.
Interpersonal skills using tact, patience, and courtesy.
Research methods and report writing techniques.
Oral and written communication skills.
Maintain confidentiality.

Basic computer operation and student information systems.

Ability to:

Admire and support youth even through adversity.

Plan, organize, direct, and coordinate the work of certificated and classified staff.

Select, supervise, train, and evaluate staff.

Delegate authority and responsibility.

Lead and direct the operations, services, and activities of the assigned school.

Identify and respond to community and District issues, concerns, and needs.

Develop and administer District and school goals, objectives, and procedures.

Prepare clear and concise reports.

Administer and monitor school budgets.

Analyze problems, identify alternative solutions, project consequences of proposed actions and implement recommendations in support of goals.

Research, analyze and evaluate new instructional methods and techniques.

Communicate clearly and concisely, both orally and in writing.

Establish and maintain effective working relationships with those contacted in the course of work.

Maintain effective audio-visual discrimination and perception needed for successful job performance.

Maintain mental capacity which allows the capability of making sound decisions and demonstrating intellectual capabilities.

Read, interpret, apply, and explain rules, regulations, policies, and procedures.

Maintain consistent, punctual, and regular attendance.

Maintaining emotional stability and self-control under pressure, challenge, or adversity.

Present self as a positive representative of the school district.

EXPERIENCE AND TRAINING GUIDELINES

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Experience:

Five years of successful teaching experience, including two years of school site administrative and supervisory responsibility.

Training:

Equivalent to a Master's Degree from an accredited college or university with major course work in education, education administration, social work, or an education related field. Bilingual, oral and written (Spanish), preferred, but not required.

License or Certificate:

Possession of a valid California Teaching or other related Credential.

Valid California Administrative Credential.

Valid California Class C driver's license.

WORKING CONDITIONS:

Environmental Conditions:

Office and school environment.

Constant interruptions.

Driving a vehicle to conduct work.

Physical Conditions:

Essential and marginal functions may require maintaining physical condition necessary for sustained posture in a seated and in a standing position for extended periods of time.

Hear and speak to exchange information and make presentations.

Move hands and fingers to operate a computer keyboard.

Bend at the waist, kneel or crouch.

See to monitor students and read a variety of materials.

JOB PROFILE:

Annual Contract: 204-224 days

Salary: Administrative Salary Schedule

RIVER DELTA UNIFIED SCHOOL DISTRICT

VICE PRINCIPAL

Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are not intended to reflect all duties performed within the job.

DEFINITION

To assist the Principal in all areas of responsibility involving administering and initiating school and District programs involving curriculum, budget, operations, guidance, students and staff; to assist in coordinating assigned activities with other school sites, the District Office and the community; and to provide highly responsible and complex support to the Principal.

SUPERVISION RECEIVED AND EXERCISED

Received general direction from the Principal.

Exercises direct supervision over certified and classified employees.

~~**DUTIES ESSENTIAL AND MARGINAL FUNCTION STATEMENTS**~~ *Essential and other important responsibilities and duties may include, but are not limited to, the following:*

Essential Functions:

1. Assist in administering, ~~directing and~~ directing and managing school and district-initiated programs involving curriculum, budget, operations, guidance, ~~students~~ students, and staff.
2. Assist in the implementation of goals, objectives, policies, and priorities.
3. Participate in the development and implementation of a district-approved curriculum program; curriculum alignment with content standards, performance-based assessments, use of instructional technology and articulation efforts.
4. ~~of a district approved curriculum programs; provide, assign, and coordinate in-service training for staff to ensure uniform implementation.~~
5. Assist in the direction of the school's in-service and staff development program. Lead new teacher induction and support.
- 3-6. ~~Select, train, motivate, and evaluate personnel; provide or coordinate district-approved staff training; work with employees to correct work related deficiencies; implement discipline and termination procedures.~~
7. Assist in planning, managing, and supervising school business operations; administer a budget within district guidelines, policies, and procedures; monitor and approve expenditures.
- 4-8. Assist in the development of the master teaching schedule.
9. Assist in administering school plans and organizational procedures, including student activities and student procedures.
10. ~~;~~ Promote a healthy and safe student learning environment.
- 5-11. ~~;~~ Ensure compliance with established district policies and procedures.
12. Plan, coordinate and evaluate the total program of pupil services, including guidance and counseling; participate in a variety of meetings monitoring student academics and behaviors including IEP, Student Study Teams, and 504's.
6. ~~Assist in planning, coordinating and evaluating the total program of pupil services, including guidance and counseling; participate in a variety of meetings monitoring student behaviors including IEP and Student Study Teams.~~

13. Assist in overseeing the use of curriculum materials, instructional supplies, equipment, building facilities, school grounds, and community resources; approve use of school facilities, in the absence of the Principal.
 14. Confer with students, parents, teachers, law enforcement officers, and representatives of social welfare agencies to resolve individual pupil academic, mental, social, and behavioral problems.
 15. Maintain good relationships with students, staff, and parents, and comply with established lines of authority.
 16. Oversee extra-curricular activities.
- 7.—
- 8-17. Represent the school to the District Office, outside agencies and the community in the absence of the Principal; maintain effective community relations through frequent and effective public relations campaigns.
 18. Maintain effective communications with parents; provide information of new policies and procedures in the district;
 - 9-19. Meet with parents; review student progress of behavior problems as appropriate; Maintain high standard of student conduct and enforce discipline as necessary, according to education code.
 20. Attend and participate in professional group meetings; stay abreast of new trends and innovations in school curriculum and education administration.
 - 10-21. Prepare and maintain a variety of District, County, State and federally mandated records and reports regarding student attendance, discipline, cumulative records, and academic achievement.
 22. Respond to and resolve difficult and sensitive inquiries and complaints from parents and the general community.
 23. Maintain high standard of student conduct and enforce discipline as necessary, according to due process to the rights of students.
 24. Operate a computer and other office equipment as assigned.
 25. Assure the health, safety, and welfare of students.
 - 11-26. Plan and facilitate the Secondary Education Curriculum Counsel (SECC).

Marginal Functions:

- 1.—Perform related duties as assigned.~~Perform related duties and responsibilities as required.~~

QUALIFICATIONS

Knowledge of:

Operations, ~~services~~services, and activities of a public school.
Principles, theories, practices, methods, and techniques used in curriculum development and classroom instruction.
Curriculum.
Classroom procedures which promote appropriate student conduct and motivation for student learning.
Child guidance principles and practices.
School improvement goals, objectives, and programs.
Adequate Yearly Progress report requirements applicable to the school site.
Current trends and research concerning the growth and development of school-age students.
 Standard and alternative learning theories.
Standardized student testing requirements.
 Instructional ~~techniques~~standards and faculty requirements.

School law administration, applicable sections of the State Education Code and other applicable laws codes, and regulations under federal, state, and local.

Management skills to analyze programs, ~~polici~~es~~polici~~es, and operational needs.

Principles and practices of program development and administration.

Principles and practices of budget administration and monitoring.

Principles and practices of supervision, ~~traini~~ng~~traini~~ng, and performance evaluation.

~~Pertinent Federal, State and local laws, codes and regulations.~~

~~Education Board and~~Codes and District policies, procedures, and regulations.

Interpersonal skills using tact, patience, and courtesy.

Research methods and report writing techniques.

Oral and written communication skills.

Maintain confidentiality.

Basic computer operation.

Ability to:

Admire and support youth even through adversity.

Plan, organize, direct, and coordinate the work of certified and classified staff.

Select, supervise, train, and evaluate.

Prepare clear and concise reports.

Administer and monitor school budgets.

Analyze problems, identify alternative solutions, project consequences of proposed actions and implement recommendations in support of goals.

Research, analyze and evaluate new instructional methods and techniques.

Communicate clearly and concisely, both orally and in writing.

Establish and maintain effective working relationships with those contacted in the course of work.

Maintain effective audio-visual discrimination and perception needed for successful job performance.

Maintain mental capacity which allows the capability of making sound decisions and demonstrating intellectual capabilities.

Read, interpret, apply, and explain rules, regulations, policies, and procedures.

Maintain consistent, punctual, and regular attendance.

Maintaining emotional stability and self-control under pressure, challenge, or adversity.

Present self as a positive representative of the school district

EXPERIENCE AND TRAINING GUIDELINES

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Experience:

Five years of ~~successful~~responsible teaching experience, including ~~two years of school-~~based leadership roles ~~administrative~~ and ~~supervisory~~ responsibility.

Training:

Equivalent to a Master's Degree from an accredited college or university with major course work in education, education administration, social work, or an education a-related field. Bilingual, oral and written (Spanish), preferred, but not a~~accredited~~required.

License or Certificate:

Possession of ~~an Administrative Services Credential issued by the State of California, a valid~~
California Teaching or other related Credential.
Valid California Administrative Credential.
Valid California Class C Driver's License.

WORKING CONDITIONS:

Environmental Conditions:

Office and school environment.
Constant interruptions.
Driving a vehicle to conduct work.

Physical Conditions:

Essential and marginal functions may require maintaining physical condition necessary for sustained posture in a seated and in a standing position for extended periods of time.
Hear and speak to exchange information and make presentations.
Move hands and fingers to operate a computer keyboard.
Bend at the waist, kneel or crouch.
See to monitor students and read a variety of materials.

JOB PROFILE:.

Annual Contract: 204 days
Salary: Administrative Salary Schedule

**RIVER DELTA UNIFIED SCHOOL DISTRICT
VICE PRINCIPAL**

DEFINITION

To assist the Principal in all areas of responsibility involving administering and initiating school and District programs involving curriculum, budget, operations, guidance, students and staff; to assist in coordinating assigned activities with other school sites, the District Office and the community; and to provide highly responsible and complex support to the Principal.

SUPERVISION RECEIVED AND EXERCISED

Received general direction from the Principal.

Exercises direct supervision over certified and classified employees.

DUTIES

Essential Functions:

1. Assist in administering, directing and managing school and district-initiated programs involving curriculum, budget, operations, guidance, students, and staff.
2. Assist in the implementation of goals, objectives, policies, and priorities.
3. Participate in the development and implementation of a district-approved curriculum program; curriculum alignment with content standards, performance-based assessments, use of instructional technology and articulation efforts.

4. Assist in the direction of the school's in-service and staff development program. Lead new teacher induction and support.
5. Select, train, motivate, and evaluate personnel; provide or coordinate district-approved staff training; work with employees to correct work related deficiencies; implement discipline and termination procedures.
6. Assist in planning, managing, and supervising school business operations; administer a budget within district guidelines, policies, and procedures; monitor and approve expenditures.
7. Assist in the development of the master teaching schedule.
8. Assist in administering school plans and organizational procedures, including student activities and student procedures.
9. Promote a healthy and safe student learning environment.
10. Ensure compliance with established district policies and procedures.
11. Plan, coordinate and evaluate the total program of pupil services, including guidance and counseling; participate in a variety of meetings monitoring student academics and behaviors including IEP, Student Study Teams, and 504's.
12. Assist in overseeing the use of curriculum materials, instructional supplies, equipment, building facilities, school grounds, and community resources; approve use of school facilities, in the absence of the Principal.
13. Confer with students, parents, teachers, law enforcement officers, and representatives of social welfare agencies to resolve individual pupil academic, mental, social, and behavioral problems.
14. Maintain good relationships with students, staff, and parents, and comply with

- established lines of authority.
15. Oversee extra-curricular activities.
 16. Represent the school to the District Office, outside agencies and the community in the absence of the Principal; maintain effective community relations through frequent and effective public relations campaigns.
 17. Maintain effective communications with parents; provide information of new policies and procedures in the district.
 18. Meet with parents; review student progress of behavior problems as appropriate; Maintain high standard of student conduct and enforce discipline as necessary, according to education code.
 19. Attend and participate in professional group meetings; stay abreast of new trends and innovations in school curriculum and education administration.
 20. Prepare and maintain a variety of District, County, State and federally mandated records and reports regarding student attendance, discipline, cumulative records, and academic achievement.
 21. Respond to and resolve difficult and sensitive inquiries and complaints from parents and the general community.
 22. Maintain high standard of student conduct and enforce discipline as necessary, according to due process to the rights of students.
 23. Operate a computer and other office equipment as assigned.
 24. Assure the health, safety, and welfare of students.
 25. Plan and facilitate the Secondary Education Curriculum Counsel (SECC).

Marginal Functions:

Perform related duties as assigned.

QUALIFICATIONS

Knowledge of:

Operations, services, and activities of a public school.
Principles, theories, practices, methods, and techniques used in curriculum development and classroom instruction.
Classroom procedures which promote appropriate student conduct and motivation for student learning.
Child guidance principles and practices.
School improvement goals, objectives, and programs.
Adequate Yearly Progress report requirements applicable to the school site.
Current trends and research concerning the growth and development of school-age students.
Standard and alternative learning theories.
Standardized student testing requirements.
Instructional standards and faculty requirements.
School law administration, applicable sections of the State Education Code and other applicable laws codes, and regulations under federal, state, and local.
Management skills to analyze programs, policies, and operational needs.
Principles and practices of program development and administration.
Principles and practices of budget administration and monitoring.
Principles and practices of supervision, training, and performance evaluation.
Board and District policies, procedures, and regulations.
Interpersonal skills using tact, patience, and courtesy.
Research methods and report writing techniques.
Oral and written communication skills.

Maintain confidentiality.
Basic computer operation.

Ability to:

Admire and support youth even through adversity.
Plan, organize, direct, and coordinate the work of certified and classified staff.
Select, supervise, train, and evaluate.
Prepare clear and concise reports.
Administer and monitor school budgets.
Analyze problems, identify alternative solutions, project consequences of proposed actions and implement recommendations in support of goals.
Research, analyze and evaluate new instructional methods and techniques.
Communicate clearly and concisely, both orally and in writing.
Establish and maintain effective working relationships with those contacted in the course of work.
Maintain effective audio-visual discrimination and perception needed for successful job performance.
Maintain mental capacity which allows the capability of making sound decisions and demonstrating intellectual capabilities.
Read, interpret, apply, and explain rules, regulations, policies, and procedures.
Maintain consistent, punctual, and regular attendance.
Maintaining emotional stability and self-control under pressure, challenge, or adversity.
Present self as a positive representative of the school district

EXPERIENCE AND TRAINING GUIDELINES

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Experience:

Five years of successful teaching experience, including school-based leadership roles and responsibility.

Training:

Equivalent to a Master's Degree from an accredited college or university with major course work in education, education administration, social work, or an education related field. Bilingual, oral and written (Spanish), preferred, but not required.

License or Certificate:

Possession of a valid California Teaching or other related Credential.
Valid California Administrative Credential.
Valid California Class C Driver's License.

WORKING CONDITIONS:

Environmental Conditions:

Office and school environment.
Constant interruptions.

Driving a vehicle to conduct work.

Physical Conditions:

Essential and marginal functions may require maintaining physical condition necessary for sustained posture in a seated and in a standing position for extended periods of time.

Hear and speak to exchange information and make presentations.

Move hands and fingers to operate a computer keyboard.

Bend at the waist, kneel or crouch.

See to monitor students and read a variety of materials.

JOB PROFILE:.

Annual Contract: 204 days

Salary: Administrative Salary Schedule

**RIVER DELTA UNIFIED SCHOOL DISTRICT
DIRECTOR OF PERSONNEL**

Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are not intended to reflect all duties performed within the job.

DEFINITION

To perform a variety of highly responsible complex and confidential administrative duties related to all the aspects of the Personnel Department's human resource functions; to maintain personnel records and databases; to provide information and assistance to District employees and the general public regarding personnel activities, personnel policies and procedures; task related to employer/employee relations; policy development and compliance with federal and state laws; oversight of operations; analyze and monitor credentials for the purpose of compliance; to assist the Superintendent, Business Services, Educational Services, and school administrators with plans for the District's staffing needs; and to perform related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives direction ~~supervision~~ from ~~assigned supervisory or management staff.~~ the Superintendent.

Exercise direct supervision over lower-level clerical staff.

~~**ESSENTIAL AND MARGINAL FUNCTION STATEMENTS** — Essential and other important responsibilities and duties may include, but are not limited to, the following:~~ **DUTIES:**

Essential Functions:

1. Keeps abreast of personnel laws, policies, and regulations. Provides information and assistance to District staff and the public regarding Board, District, and State personnel policies, ~~procedures~~ procedures, and processes. Directs and manages daily internal operations of the Personnel department.
2. Manages, directs and ~~Coordinates~~ coordinates the personnel recruitment and selection process; coordinate ~~prepares the posting~~ job announcements postings, advertises vacancies in compliance with applicable bargaining unit contract guidelines, ed code, and/or district policies; at each District site and advertise jobs in newspapers using district procedures;. Provides information on position requirements to prospective applicants. ~~colleges and job lines; receives applications and forward to the administrator.~~ Schedules all personnel related employment testing.
3. Receives applications for job vacancies; pre-screens applications to ensure compliance with minimum qualifications and forward to the appropriate supervisor; coordinates interview panel and schedules interviews; notify candidates of status, evaluates transcripts and records of work experience. Request reference checks on applicants; maintain application files; determines proper salary placement for all employees; extends offer of employment to selected applicants.

- ~~3.4.~~ Conducts onboarding meetings for new employees for the purpose of informing them of their rights and responsibilities according to the law, district policies, and the bargaining unit agreement when applicable. Ensures all required employment paperwork is completed and timely.
- ~~5.~~ Maintains and updates ~~Input and retrieve~~ a variety of data and information supporting the administration of the personnel systems using a personnel database program ~~on the computer~~.
- ~~6.~~ Administers, establishes, and maintains a variety of specialized and confidential personnel records, files, and list; processes and verifies employee status, change and transfers to maintain legal compliance.
- ~~7.~~ Processes confidential information including grievances, complaints, employee discipline, negotiations, and bargaining unit requests for information. Performs high level personnel investigations.
- ~~8.~~ Serves as point of contact for the District to the Commission on Teacher Credentialing (CTC), County Office of Education, and Internship Agencies relative to credentialing.
- ~~4.9.~~ Assists Assistant Superintendent of Educational Services with pre-intern, intern, and induction programs; maintain current information regarding credentialing requirements and provide current information to others as needed.
- ~~5.~~ Compile and maintain personnel records; process and verify employee status, change and transfers to maintain legal compliance.
- ~~6.10.~~ Audits and monitors certificated and administrative credentials, including all necessary State and Board resolutions regarding waivers, and emergency credentials; as well as record postgraduate units and degrees; maintain professional development records; ensure legal compliance. Provides credential information to staff and applicants. Assists with processing of credential, permit, and waiver applications, and verifies applications are complete and accurate.
- ~~11.~~ Develops, implements, and monitors the District's evaluation process according to bargaining unit procedures. Maintains annual list of employees to be evaluated; ~~forward and distributes the most current list~~ to the appropriate administrator; ~~provides guidance to administrators regarding the implementation of evaluation tool; discipline procedure; development of performance improvement plan; investigative document; and employee management.~~ ~~m~~Monitors timely receipt of appropriate evaluations for all staff.
- ~~7.12.~~ Processes unemployment insurance claims, assists in the resolution of problems arising from related actions, attend unemployment hearings as needed.
- ~~13.~~ Prepares recommendations and presentations for ~~Develop~~ board agenda items related to ~~P~~ersonnel matters, including but not limited to employment, resignations, leaves, tenure, permits, waivers, and other related information.
- ~~14.~~ Processes past and present employees' verifications for student loans, years of service, leave balance transfers, and other related documents.
- ~~15.~~ Serves as member of District negotiating team and perform responsibilities needed for classified and certificated negotiations. Including but not limited to attending meetings and negotiation sessions; assists in preparation of employer/employee relation materials and other data needed for negotiations with certificated and classified personnel. Compile information for use in contract negotiations, grievance resolution, layoff, and/or employee discipline process.

- ~~8.16.~~ Serves as a member of District Cabinet team and other district committees as assigned.
17. Responds to telephone, in-person, and written inquiries of personnel, the public, parents, governmental officials/representatives, private enterprise, etc. for the purpose of providing information and/or direction. Develops responses to requests from the public and agencies for information for salary data, employment information and related matters.
18. Evaluates situations and or issues involving district employees, parents, the public, etc. for the purpose of taking appropriate action and/or directing appropriate personnel to resolve.
19. Monitors assigned activities and critical timelines for the purpose of ensuring compliance with legal and/or administrative requirements, state and federal laws, rules and regulations related to personnel matters.
- ~~9.20.~~ Gathers and analyzes data and prepare district, state, local, and federal reports related to personnel accordingly while maintaining compliance with deadline dates.
- ~~21.~~ Establish and maintain confidential personnel files and records. Provides timely and accurate information to payroll for all actions affecting employee compensation including but not limited to Employee Information Records (EIR) and Personnel Action Forms (PAF).
22. Develops job descriptions and appropriate classifications for new positions and performs ongoing evaluation and updating of existing job descriptions to maintain current.
23. Administers and maintains all employment required annual training for compliance with education code, OSHA and insurance requirements, state, federal, and labor codes, and safety/health training.
- ~~10.~~ Initiates and/or coordinates the revision of forms and documents used in the operational management of the personnel office to ensure compliance and up-to-date information.
- ~~11.24.~~ Monitors fingerprinting requirements and ensures that all employees are compliant prior to rendering services. Assumes responsibilities as Custodian of Records on file with the Department of Justice (DOJ). Record and process fingerprints for all employees.
- ~~12.25.~~ Administers ~~Coordinate~~ substitute management systems services for certified and classified employees; maintains a viable list of substitutes. Secures long-term substitute employees for vacancies and leaves.
- ~~13.26.~~ Independently ~~D~~develops and generates letters, memoranda, emails, and other correspondence, ~~and report~~handbooks, reports, and other related materials related to human resource programs and activities. Distributes personnel related publications, newsletters, etc. Disperses annual notifications to staff.
27. Maintains current knowledge of office technology, software, programs, practices related to current trends in personnel. Operates a variety of office equipment including but not limited to a computer, copy machine, and printer.

~~14.~~ —

Marginal Functions:

1. Opens, sorts, ~~distributed~~distributes, and answers mail related to Personnel issues.
2. Updates and maintains various state and federal reports and files.
3. Performs related duties and responsibilities as required.

QUALIFICATIONS

Knowledge of:

Basic mathematical skills

~~Personnel management systems, position control systems, staff and student information system, and programs-~~

Modern office procedures, ~~methods~~methods, and computer equipment-

Business letter writing, record keeping, and basic report preparation-

Research and development methods, techniques, and strategies

Proper English usage, spelling, grammar, and punctuation-

~~Record-keeping methods and procedures-~~

Pertinent Education, Federal, ~~State~~State, and local laws, ~~codes~~codes, and regulations-

Labor laws, contract negotiations, management, and grievance processes

~~Principals~~Principles and practices of management, supervisionssupervision, and training-

Evaluation practices, methods, and design

Principles, trends, methods, strategies, and procedures pertaining to personnel management

Principles of classification and compensation

Legal and equitable recruitment and selection techniques and procedures

Ability to:

~~Collect and compile~~Collect, compile, and analyze information and data ~~for a and prepare a~~ variety of comprehensive reports.

Analyze organization problems, develop alternative solutions, recommend, and make sound and timely decisions.

Maintain confidentiality ~~of work.~~

Work both independently ~~in the absence of supervision~~with little supervision and as part of a team.

Communicate effectively, both orally and in writing.

Perform mathematical calculations quickly and accurately.

Type or word process at a speed necessary for adequate job performance.

Accurately i~~nterpret, and~~apply, and explain general personnel policies and procedures applicable to the ~~District~~district in a variety of settings.

Operate a variety of modern equipment including computer equipment.

Establish and maintain cooperative working relationships with employee groups, the public, and members of the management team.~~those contacted in the course of work-~~

Maintain mental capacity which allows the capability of making sound decisions and demonstrating intellectual capabilities while remaining objective in all matter that require the utmost discretion and sensitivity.

Maintain effective audio-visual discrimination and perception needed for successful job performance.

~~Oversee~~Supervise and review work of ~~lower level~~lower-level staff.

Develop schedules and meet deadlines.

Provide service and assistance to others while maintaining tact, patience, and courtesy.

Sustain productivity with frequent interruptions.

Ability to learn and stay current on new software applications and programs.

Maintain consistent, punctual, and regular attendance.

Meet district standards of professional conduct as outlined in Board policy.

EXPERIENCE AND TRAINING GUIDELINES

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Experience:

~~Three~~ Five years of increasingly responsible clerical ~~experience~~experience involving frequent public contact, preferably within the areas of school or public personnel administration.

Two years of experience in a supervisory role (preferred).

Training:

~~Equivalent to the completion of twelfth grade.~~ Associate degree or minimum of 60 units from an accredited college or university with emphasis in Business OR an equivalent to completion of twelfth grade with a combination of experience and education from which comparable knowledge, skills, and abilities have been achieved, along with passing of district proficiency exam.

-Additional specialized in training in personnel administration or a related field is desirable.

Bilingual, oral and written in (Spanish) (preferred), ~~not required.~~

Prior experience working in a school district setting (preferred).

WORKING CONDITIONS

Environmental Conditions:

Office environment utilizing a computer-; in a vehicle traveling to job assignment; outdoor environment on school sites in variable weather conditions.

Physical Conditions:

Essential and marginal functions may require maintaining physical condition necessary for sustained posture in a seated and in a standing position.

JOB PROFILE

Annual Contract: 12 months

Classified Management & Confidential Employees Salary Schedule: Range 17

Board Approved: ???

**RIVER DELTA UNIFIED SCHOOL DISTRICT
DIRECTOR OF PERSONNEL**

DEFINITION

To perform a variety of highly responsible complex and confidential administrative duties related to all the aspects of the Personnel Department's human resource functions; to maintain personnel records and databases; to provide information and assistance to District employees and the general public regarding personnel activities, personnel policies and procedures; task related to employer/employee relations; policy development and compliance with federal and state laws; oversight of operations; analyze and monitor credentials for the purpose of compliance; to assist the Superintendent, Business Services, Educational Services, and school administrators with plans for the District's staffing needs; and to perform related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives direct supervision from the Superintendent.

Exercise direct supervision over lower-level clerical staff.

DUTIES:

Essential Functions:

1. Keeps abreast of personnel laws, policies, and regulations. Provides information and assistance to District staff and the public regarding Board, District, and State personnel policies, procedures, and processes. Directs and manages daily internal operations of the Personnel department.
2. Manages, directs, and coordinates the personnel recruitment and selection process; prepares job announcements postings, advertises vacancies in compliance with applicable bargaining unit contract guidelines, ed code, and/or district policies; using district procedures. Provides information on position requirements to prospective applicants. Schedules all personnel related employment testing.
3. Receives applications for job vacancies; pre-screens applications to ensure compliance with minimum qualifications and forward to the appropriate supervisor; coordinates interview panel and schedules interviews; notify candidates of status, evaluates transcripts and records of work experience. Request reference checks on applicants; maintain application files; determines proper salary placement for all employees; extends offer of employment to selected applicants.
4. Conducts on/boarding meetings for new employees for the purpose of informing them of their rights and responsibilities according to the law, district policies, and the bargaining unit agreement when applicable. Ensures all required employment paperwork is completed and timely.
5. Maintains and updates a variety of data and information supporting the administration of the personnel systems using a personnel database program.
6. Administers, establishes, and maintains a variety of specialized and confidential personnel records, files, and list; processes and verifies employee status, change and transfers to maintain legal compliance.
7. Processes confidential information including grievances, complaints, employee discipline, negotiations, and bargaining unit requests for information. Performs high level personnel investigations.

8. Serves as point of contact for the District to the Commission on Teacher Credentialing (CTC), County Office of Education, and Internship Agencies relative to credentialing.
9. Assists Assistant Superintendent of Educational Services with pre-intern, intern, and induction programs; maintain current information regarding credentialing requirements and provide current information to others as needed.
10. Audits and monitors certificated and administrative credentials, including all necessary State and Board resolutions regarding waivers, and emergency credentials; as well as record postgraduate units and degrees; maintain professional development records; ensure legal compliance. Provides credential information to staff and applicants. Assists with processing of credential, permit, and waiver applications, and verifies applications are complete and accurate.
11. Develops, implements, and monitors the District's evaluation process according to bargaining unit procedures. Maintains annual list of employees to be evaluated and distributes the most current list to the appropriate administrator; provides guidance to administrators regarding the implementation of evaluation tool; discipline procedure; development of performance improvement plan; investigative document; and employee management. Monitors timely receipt of appropriate evaluations for all staff.
12. Processes unemployment insurance claims, assists in the resolution of problems arising from related actions, attend unemployment hearings as needed.
13. Prepares recommendations and presentations for board agenda items related to personnel matters, including but not limited to employment, resignations, leaves, tenure, permits, waivers, and other related information.
14. Processes past and present employees' verifications for student loans, years of service, leave balance transfers, and other related documents.
15. Serves as member of District negotiating team and perform responsibilities needed for classified and certificated negotiations. Including but not limited to attending meetings and negotiation sessions; assists in preparation of employer/employee relation materials and other data needed for negotiations with certificated and classified personnel. Compile information for use in contract negotiations, grievance resolution, layoff, and/or employee discipline process.
16. Serves as a member of District Cabinet team and other district committees as assigned.
17. Responds to telephone, in-person, and written inquiries of personnel, the public, parents, governmental officials/representatives, private enterprise, etc. for the purpose of providing information and/or direction. Develops responses to requests from the public and agencies for information for salary data, employment information and related matters.
18. Evaluates situations and or issues involving district employees, parents, the public, etc. for the purpose of taking appropriate action and/or directing appropriate personnel to resolve.
19. Monitors assigned activities and critical timelines for the purpose of ensuring compliance with legal and/or administrative requirements, state and federal laws, rules and regulations related to personnel matters.
20. Gathers and analyzes data and prepares district, state, local, and federal reports related to personnel accordingly while maintaining compliance with deadline dates.
21. Provides timely and accurate information to payroll for all actions affecting employee compensation including but not limited to Employee Information Records (EIR) and Personnel Action Forms (PAF).
22. Develops job descriptions and appropriate classifications for new positions and performs ongoing evaluation and updating of existing job descriptions to maintain current.
23. Administers and maintains all employment required annual training for compliance with education code, OSHA and insurance requirements, state, federal, and labor codes, and safety/health training.

24. Initiates and/or coordinates the revision of forms and documents used in the operational management of the personnel office to ensure compliance and up-to-date information.
25. Monitors fingerprinting requirements and ensures that all employees are compliant prior to rendering services. Assumes responsibilities as Custodian of Records on file with the Department of Justice (DOJ).
26. Administers substitute management system for certified and classified employees; maintains a viable list of substitutes. Secures long-term substitute employees for vacancies and leaves.
27. Independently develops and generates letters, memoranda, emails, correspondence, handbooks, reports, and other related materials related to human resource programs and activities. Distributes personnel related publications, newsletters, etc. Disperses annual notifications to staff.
28. Maintains current knowledge of office technology, software, programs, practices related to current trends in personnel. Operates a variety of office equipment including but not limited to a computer, copy machine, and printer.

Marginal Functions:

1. Opens, sorts, distributes, and answers mail related to Personnel issues.
2. Updates and maintains various state and federal reports and files.
3. Performs related duties and responsibilities as required.

QUALIFICATIONS

Knowledge of:

Basic mathematical skills

Personnel management systems, position control systems, staff and student information system, and programs

Modern office procedures, methods, and computer equipment

Business letter writing, record keeping, and basic report preparation.

Research and development methods, techniques, and strategies

Proper English usage, spelling, grammar, and punctuation

Pertinent Education, Federal, State, and local laws, codes, and regulations

Labor laws, contract negotiations, management, and grievance processes

Principles and practices of management, supervision, and training

Evaluation practices, methods, and design

Principles, trends, methods, strategies, and procedures pertaining to personnel management.

Principles of classification and compensation

Legal and equitable recruitment and selection techniques and procedures

Ability to:

Collect, compile, and analyze information and data and prepare a variety of comprehensive reports.

Analyze organization problems, develop alternative solutions, recommend, and make sound and timely decisions.

Maintain confidentiality.

Work both independently with little supervision and as part of a team.

Communicate effectively, both orally and in writing.

Perform mathematical calculations quickly and accurately.

Type or word process at a speed necessary for adequate job performance.

Accurately interpret, apply, and explain general personnel policies and procedures applicable to the district in a variety of settings.
Operate a variety of modern equipment including computer equipment.
Establish and maintain cooperative working relationships with employee groups, the public, and members of the management team.
Maintain mental capacity which allows the capability of making sound decisions and demonstrating intellectual capabilities while remaining objective in all matters that require the utmost discretion and sensitivity.
Maintain effective audio-visual discrimination and perception needed for successful job performance.
Supervise and review work of lower-level staff.
Develop schedules and meet deadlines.
Provide service and assistance to others while maintaining tact, patience, and courtesy.
Sustain productivity with frequent interruptions.
Ability to learn and stay current on new software applications and programs.
Maintain consistent, punctual, and regular attendance.
Meet district standards of professional conduct as outlined in Board policy.

EXPERIENCE AND TRAINING GUIDELINES

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Experience:

Five years of increasingly responsible clerical experience involving frequent public contact, preferably within the areas of school or public personnel administration.
Two years of experience in a supervisory role (preferred).

Training:

Associate degree or minimum of 60 units from an accredited college or university with emphasis in Business OR an equivalent to completion of twelfth grade with a combination of experience and education from which comparable knowledge, skills, and abilities have been achieved, along with passing of district proficiency exam.
Additional specialized training in personnel administration or a related field is desirable.
Bilingual, oral and written in Spanish (preferred).
Prior experience working in a school district setting (preferred).

WORKING CONDITIONS

Environmental Conditions:

Office environment utilizing a computer; in a vehicle traveling to job assignment; outdoor environment on school sites in variable weather conditions.

Physical Conditions:

Essential and marginal functions may require maintaining physical condition necessary for sustained posture in a seated and in a standing position.

JOB PROFILE

Annual Contract: 12 months

Classified Management & Confidential Employees Salary Schedule: Range 17

Board Approved:

**RIVER DELTA UNIFIED SCHOOL DISTRICT
EXECUTIVE ASSISTANT TO THE SUPERINTENDENT
AND THE BOARD OF TRUSTEES**

Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are not intended to reflect all duties performed within the job.

DEFINITION

Under general direction, this position performs a wide variety of complex, difficult administrative, ~~confidential~~confidential, and secretarial assignments for the Superintendent and the Board of Trustees; and, as a cabinet level position, relieves the Superintendent of administrative and technical detail.

DISTINGUISHING CHARACTERISTICS

The Executive Assistant differs from other classes in the level of responsibility and interaction with the Board of Trustees, school district administrators, outside governmental agencies, the public, and the news media, as well as level of independent judgement and discretion exercised; performs high complex duties requiring independent analysis in support of the Superintendent, District and Board; plans, organizes and coordinates assigned projects and communications.

**SUPERVISION RECEIVED AND EXERCISED
DIRECTLY RESPONSIBLE TO**

Directly responsible to Board of Trustees and Superintendent

SUPERVISION OVER

Exercises direct supervision over lower-level clerical staff and other office personnel, including student trainees, have delegation authority, hiring and all levels of discipline authority.

DUTIES: AND RESPONSIBILITIES

Essential Functions:

1. Performs highly responsible administrative support duties as the primary and confidential Executive Assistant to the Superintendent, to relieve the Superintendent of administrative and clerical detail; Assures smooth and efficient office operations. Scheduling/Coordination/Board of Trustees Responsibilities
2. Manages office details by relieving the Superintendent of routine requests and matters; may schedule and coordinate the Superintendent's calendar and appointments; may schedule and coordinate travel and conference arrangements for Superintendent and Board members.
3. Coordinates timely receipt of Board of Trustees agenda items; schedules, coordinates, and directs the activities of clerical and other office personnel; according to the Brown Act guidelines, plans and coordinates meetings and public hearings as assigned including preparation and distribution of notices, agendas, and supplementary materials, scheduling of facilities and audio-visual needs, preparation of minutes and follow-up actions, and minutes of meetings. Such meetings include meetings of the Board of Trustees (closed and open sessions), Superintendent's Cabinet, assist with Leadership meetings and others as assigned.

Communications/Document Preparation

4. Receives and responds to in-person telephone complaints, concerns, and requests for information from parents, outside agents/agencies, state/county offices, and/or staff, interpreting problem and needs then either solving it or referring the inquiries to the proper authority.

Creates and processes letters, memos, messages, newsletters, faxes, and emails independently for the Superintendent and Board; interprets and explains office policies, programs, and legislative regulations; provides effective oral and written ~~communication, and~~ communication and maintains positive relationships with the members of the Board of Trustees, office staff, school district personnel, other county offices, outside agencies, the public, and the news media.;

5. ~~k~~Keeps the Superintendent apprised of potential problems and concerns.
6. Coordinates translation needs of the district office and ~~B~~board.
7. Coordinates and assists administrative staff with creating/writing/editing district job descriptions as needed.

Record Keeping

8. Prepares purchase orders and supply requisitions; may monitor receipt of materials and invoices related to the Superintendent's office and Board of Trustees.
9. ~~;~~ ~~m~~Maintains permanent and compliant Board Minutes, Agendas and Resolution files; maintains records of service of ~~t~~TTrustees, maintains files for Conflicts of Interest form for Board members and designated staff.
10. Using a computer, prepares letters, memos, messages, reports, meeting agendas, and ~~M~~minutes, accordance with legal requirements of the Brown Act, Education and Election ~~Codes;~~ Codes, edits letters, annual reports, newsletters and any related publications for the Superintendent and Board.
11. ~~Using a computer maintains~~ Oversees databases for inter/intra-district transfers, ~~suspensions~~ suspensions, and expulsions; log for legal (student-related) notices received by the district office from child protective services, probation departments, as well as subpoenas.

Special Projects

12. Special Projects as assigned by the Superintendent and/or the Board of Trustees includes, but not limited to: planning, coordination and implementation of ~~S~~superintendent office's needs ~~and planning~~, coordination and implementation of ~~b~~BBoard elections; serving as assistant and ~~S~~secretary to the Superintendent and Superintendent's Cabinet including planning and coordination of meetings.;
13. ~~s~~Serving as ~~assistant and~~ secretary to the Board of Trustees including the planning, ~~assisting~~, and coordination of ~~and~~ attendance and meetings, providing requested input and recording proceedings, and fiscal responsibilities and Brown Act compliance responsibilities.;
14. ~~e~~Coordinates and organizes necessary information to ~~secretaries-administrators~~ of schools/programs; manages and organizes annual district wide classified staffing CBEDS collection including audit and submissions of electronic data.;
15. ~~w~~Writes and maintains compliance of mandated district level annual parent/student notices through the Parent/Student ~~Guidebook~~ Handbook.
16. ~~;~~ ~~m~~Manages and organizes annual schools- and district level SARCS including audit, submission, and publication.;
17. ~~m~~Manages and organizes annual/bi-annual Conflict of Interest Code review and edits; ~~manages and organizes board~~ policy and regulation updates.;
- coordinates ~~ing~~ the review and edits for submission of policy and regulations to the ~~b~~BBoard for approval and then to CSBA Gamut for online submission/publication.;

18. ~~r~~Recommends and writes policy and regulation for areas of ~~responsibility,~~ ~~and responsibility and~~ assist district administration in writing and updating policies and regulations in their areas of responsibility.
19. ~~a~~Attends conferences, workshops, and meetings as needed.
20. ~~a~~Assists clerical and other staff as needed with computer use, office methods, etc.
21. Manages and coordinates those student services as assigned, including, but not limited to: manages and supervises the ~~D~~istrict's summer youth employment programs, coordinating with various county agencies offering such funded programs, providing placements and overseeing the appropriate training is provided to the students, as well as coordinating any internal district-level programs available to students.
22. ~~co~~ordination of ~~revies and e~~Edits to the Student Discipline Guide assuring Education/Penal Codes compliance.
23. ~~m~~Manages and coordinates expulsions/suspension process including submission before the ~~board~~ Board and reports to state agencies. Reviews and finalizes expulsions documents meeting educational code deadlines, schedules student discipline panel hearings. Coordinates either internal or external alternate placement of students if expulsion is issued.
24. ~~a~~Assists with the creation of the annual district calendars and creates the annual attendance calendars for the schools.
25. ~~a~~Assists administrators with the processing of iInter/Intra ~~d~~District ~~t~~Transfer requests.
26. Takes on other projects as assigned, such as data/information research preparing a response and recommendation.
27. Assists Superintendent with tasks from the Director of Personnel in the event the Director of Personnel is unavailable.
28. Manages and coordinates documents for the Board of Trustees election, Board vacancies, and appointments including resolutions, notices, certification, oath of offices, for all three counties: Solano, Sacramento, and Yolo.
29. Works closely with the Personnel Department, Business Services, and Director of Accounting, on issues of FTE and Requests for Position Change as they relate to position control. Creates and updates positions in employee information system based on information received via PAF and EIR.
30. Prepares/provides reporting information from position control.
31. Performs year-end procedures, rolls over Position Control for new fiscal school year and performs new year procedures.

Marginal Functions:

1. Opens, sorts, distributes, and answers mail related to Executive Assistants desk.
2. Updates and maintains various state and federal reports and files.
3. Performs related duties and responsibilities as required.

MINIMUM QUALIFICATIONS

Knowledge of:

Education, Training, and Experience

~~Any combination of education, training, and/or experience which demonstrates ability to perform the duties as described including extensive satisfactory experience at the executive secretarial level preferably in a public education environment.~~

Knowledge, Skills and Abilities

Coordination skills to effectively coordinate a variety of difficult, technical functions in a Superintendent's office;

~~w~~Written communication skills to prepare clear, concise grammatically correct (~~i~~including punctuation and spelling), letters, memos, and Minutes and other written documents;

~~e~~Oral communication skills to communicate effectively with the Board of Trustees, county office personnel, district and schools administrative staffs, outside district agencies, the public and news ~~media~~media.

~~d~~Demonstrating ~~t~~act, and diplomacy;

~~s~~Leadership skill ~~in leading and for~~ directing work of other clerical and office personnel;

~~e~~Organizational skills to set priorities, define tasks, schedule and coordinate activities and functions, develop procedures and complete assignments;

~~d~~Decision-making skills to exercise independent thinking and good judgement;

~~m~~Mathematical analysis and computational skills for purchase order requisitions, position control, and student services related decisions;

~~a~~Ability to operate and troubleshoot a variety of office equipment including computer, fax machine, calculator and copier;

~~r~~Reading comprehension skills to interpret policies, administrative ~~regulation~~regulation, and legislation, and accurately explain to others;

~~r~~Record keeping skills to establish and maintain effective file systems;

~~r~~Research skills to identify and collect appropriate data;

~~i~~Interpersonal skills to establish and maintain cooperative relationships with those contacted in the course of work assignments.

Data entry for maintaining accurate Position Control systems and programs.

~~Type~~ Clerical skills to be able to type at a speed of 75 wpm, ~~take dictation at a speed of 100 wpm and accurately~~

~~t~~ Auditory processing skills transcribe data and audio files.

Ability to:

Other Characteristics

Willingness to work during evening hours attending Regular and ~~special~~ Special Board of Trustees ~~meetings~~ Meetings.

~~Maintain effective audio-visual discrimination and perception needed for successful job performance.~~

Maintain mental capacity which allows the capability of making sound decisions and demonstrating intellectual capabilities.

~~Bilingual, oral and written (Spanish) preferred, not required. Collect, compile, and analyze information and data and prepare a variety of comprehensive reports.~~

Maintain confidentiality.

Work both independently with little supervision and as part of a team.

Accurately interpret, apply, and explain general personnel policies and procedures applicable to the district in a variety of settings.

Supervise and review work of lower-level staff.

Develop schedules and meet deadlines.

Provide service and assistance to others while maintaining tact, patience, and courtesy.

Sustain productivity with frequent interruptions.

Setup and operate office equipment and devices.

Ability to learn and stay current on new software applications and programs.

Maintain consistent, punctual, and regular attendance.
Meet district standards of professional conduct as outlined in Board policy.

EXPERIENCE AND TRAINING GUIDELINES

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Experience:

Four years of increasingly extensive satisfactory clerical experience involving frequent public contact, preferably within the areas of school or public personnel administration.
Two years of experience in a supervisory role (preferred).

Training:

Associate degree or minimum of 60 units from an accredited college or university with emphasis in Business OR an equivalent to completion of twelfth grade with a combination of experience and education from which comparable knowledge, skills, and abilities have been achieved, along with passing of district proficiency exam.
Bilingual, oral and written in Spanish (preferred).
Prior experience working in a school district setting (preferred).

Education, Training, and Experience

Any combination of education, training, and/or experience which demonstrates ability to perform the duties as described including extensive satisfactory experience at the executive secretarial level preferably in a public education environment.

WORKING CONDITIONS

Environmental Conditions:

Office environment. ~~(extensive use of computer).~~

Physical Conditions:

Essential and marginal functions may require maintaining physical condition necessary for sustained posture in a seated ~~and in~~ a standing position.

JOB PROFILE:

Annual Contract: 12 ~~month~~months

Classified Management & Confidential Employees Salary Schedule:Salary: Range 175

Board Approved: ???

Confidential/Classified Management position

**RIVER DELTA UNIFIED SCHOOL DISTRICT
EXECUTIVE ASSISTANT TO THE SUPERINTENDENT
AND THE BOARD OF TRUSTEES**

DEFINITION

Under general direction, this position performs a wide variety of complex, difficult administrative, confidential, and secretarial assignments for the Superintendent and the Board of Trustees and, as a cabinet level position, relieves the Superintendent of administrative and technical detail.

DISTINGUISHING CHARACTERISTICS

The Executive Assistant differs from other classes in the level of responsibility and interaction with the Board of Trustees, school district administrators, outside governmental agencies, the public and the news media, as well as level of independent judgement and discretion exercised; performs high complex duties requiring independent analysis in support of the Superintendent, District and Board; plans, organizes and coordinates assigned projects and communications.

SUPERVISION RECEIVED AND EXERCISED

Directly responsible to Board of Trustees and Superintendent
Exercises direct supervision over lower-level clerical staff and other office personnel, including student trainees, have delegation authority, hiring and all levels of discipline authority.

DUTIES:

Essential Functions:

1. Performs highly responsible administrative support duties as the primary and confidential Executive Assistant to the Superintendent, to relieve the Superintendent of administrative and clerical detail; Assures smooth and efficient office operations.
2. Manages office details by relieving the Superintendent of routine requests and matters; may schedule and coordinate the Superintendent's calendar and appointments; may schedule and coordinate travel and conference arrangements for Superintendent and Board members.
3. Coordinates timely receipt of Board of Trustees agenda items; schedules, coordinates, and directs the activities of clerical and other office personnel; according to the Brown Act guidelines, plans and coordinates meetings and public hearings as assigned including preparation and distribution of notices, agendas, and supplementary materials, scheduling of facilities and audio-visual needs, preparation of minutes and follow-up actions, and minutes of meetings. Such meetings include meetings of the Board of Trustees (closed and open sessions), Superintendent's Cabinet, assist with Leadership meetings and others as assigned.
4. Receives and responds to in-person telephone complaints, concerns, and requests for information from parents, outside agents/agencies, state/county offices, and/or staff, interpreting problem and needs then either solves it or refers the inquiries to the proper authority.

5. Creates and processes letters, memos, messages, newsletters, faxes, and emails independently for the Superintendent and Board; interprets and explains office policies, programs, and legislative regulations; provides effective oral and written communication and maintains positive relationships with the members of the Board of Trustees, office staff, school district personnel, other county offices, outside agencies, the public, and the news media.
6. Keeps the Superintendent apprised of potential problems and concerns.
7. Coordinates translation needs of the district office and Board.
8. Coordinates and assists administrative staff with creating/writing/editing district job descriptions as needed.
9. Prepares purchase orders and supply requisitions; may monitor receipt of materials and invoices related to the Superintendent's office and Board of Trustees.
10. Maintains permanent and compliant Board Minutes, Agendas and Resolution files; maintains records of service of Trustees, maintains files for Conflicts of Interest form for Board members and designated staff.
11. Using a computer, prepares letters, memos, messages, reports, meeting agendas, and Minutes, accordance with legal requirements of the Brown Act, Education and Election Codes, edits letters, annual reports, newsletters and any related publications for the Superintendent and Board.
12. Oversees databases for inter/intra-district transfers, suspensions, and expulsions; log for legal (student-related) notices received by the district office from child protective services, probation departments, as well as subpoenas.
13. Special Projects as assigned by the Superintendent and/or the Board of Trustees includes, but not limited to planning, coordination and implementation of Superintendent office's needs, coordination and implementation of Board elections; serving as assistant and Secretary to the Superintendent and Superintendent's Cabinet including planning and coordination of meetings.
14. Serves as secretary to the Board of Trustees including the planning, assisting, and coordination of attendance and meetings, providing requested input and recording proceedings, and fiscal responsibilities and Brown Act compliance responsibilities.
15. Coordinates and organizes necessary information to administrators of schools/programs; manages and organizes annual district wide classified staffing CBEDS collection including audit and submissions of electronic data.
16. Writes and maintains compliance of mandated district level annual parent/student notices through the Parent/Student Handbook.
17. Manages and organizes annual school and district level SARCS including audit, submission, and publication.
18. Manages and organizes annual/bi-annual Conflict of Interest Code review and edits; policy and regulation updates; coordinates the review and edits for submission of policy and regulations to the Board for approval and then to CSBA Gamut for online submission/publication.
19. Recommends and writes policy and regulation for areas of responsibility and assists district administration in writing and updating policies and regulations in their areas of responsibility.
20. Attends conferences, workshops, and meetings as needed.
21. Assists clerical and other staff as needed with computer use, office methods, etc.
22. Manages and coordinates those student services as assigned, including, but not limited to manages and supervises the District's summer youth employment programs, coordinating with various county agencies offering such funded programs, providing placements and overseeing the appropriate training is provided to the students, as well as coordinating any internal district-level programs available to students.
23. Edits the Student Discipline Guide assuring Education/Penal Codes compliance.

24. Manages and coordinates expulsions/suspension process including submission before the Board and reports to state agencies. Reviews and finalizes expulsions documents meeting educational code deadlines, schedules student discipline panel hearings. Coordinates either internal or external alternate placement of students if expulsion is issued.
25. Assists with the creation of the annual district calendars and creates the annual attendance calendars for the schools.
26. Assists administrators with the processing of Inter/Intra District Transfer requests.
27. Takes on other projects as assigned, such as data/information research preparing a response and recommendation.
28. Assists Superintendent with tasks from the Director of Personnel in the event the Director of Personnel is unavailable.
29. Manages and coordinates documents for the Board of Trustees election, Board vacancies, and appointments including resolutions, notices, certification, oath of offices, for all three counties: Solano, Sacramento, and Yolo.
30. Works closely with the Personnel Department, Business Services, and Director of Accounting, on issues of FTE and Requests for Position Change as they relate to position control. Creates and updates positions in employee information system based on information received via PAF and EIR.
31. Prepares/provides reporting information from position control.
32. Performs year-end procedures, rolls over Position Control for new fiscal school year and performs new year procedures.

Marginal Functions:

1. Opens, sorts, distributes, and answers mail related to Executive Assistants desk.
2. Updates and maintains various state and federal reports and files.
3. Performs related duties and responsibilities as required.

QUALIFICATIONS

Knowledge of:

Coordination skills to effectively coordinate a variety of difficult, technical functions in a Superintendent's office.

Written communication skills to prepare clear, concise grammatically correct (including punctuation and spelling), letters, memos, and Minutes and other written documents.

Oral communication skills to communicate effectively with the Board of Trustees, county office personnel, district and school administrative staff, outside district agencies, the public and news media.

Demonstrates tact, and diplomacy.

Leadership skills for directing work of other clerical and office personnel.

Organizational skills to set priorities, define tasks, schedule and coordinate activities and functions, develop procedures and complete assignments.

Decision-making skills to exercise independent thinking and good judgement.

Mathematical analysis and computation skills for purchase order requisitions, position control, and student services related decisions.

Ability to operate and troubleshoot a variety of office equipment including computer, fax machine, calculator and copier.

Reading comprehension skills to interpret policies, administrative regulation, and legislation, and accurately explain to others.

Record keeping skills to establish and maintain effective file systems.

Research skills to identify and collect appropriate data.

Interpersonal skills to establish and maintain cooperative relationships with those contacted in the course of work assignments.

Data entry for maintaining accurate Position Control systems and programs.

Clerical skills to be able to type at a speed of 75 wpm,

Auditory processing skills transcribe data and audio files.

Ability to:

Willingness to work during evening hours attending Regular and Special Board of Trustees Meetings.

Maintain mental capacity which allows the capability of making sound decisions and demonstrating intellectual capabilities.

Collect, compile, and analyze information and data and prepare a variety of comprehensive reports.

Maintain confidentiality.

Work both independently with little supervision and as part of a team.

Accurately interpret, apply, and explain general personnel policies and procedures applicable to the district in a variety of settings.

Supervise and review work of lower-level staff.

Develop schedules and meet deadlines.

Provide service and assistance to others while maintaining tact, patience, and courtesy.

Sustain productivity with frequent interruptions.

Setup and operate office equipment and devices.

Ability to learn and stay current on new software applications and programs.

Maintain consistent, punctual, and regular attendance.

Meet district standards of professional conduct as outlined in Board policy.

EXPERIENCE AND TRAINING GUIDELINES

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Experience:

Four years of increasingly extensive satisfactory clerical experience involving frequent public contact, preferably within the areas of school or public personnel administration.

Two years of experience in a supervisory role (preferred).

Training:

Associate degree or minimum of 60 units from an accredited college or university with emphasis in Business OR an equivalent to completion of twelfth grade with a combination of experience and education from which comparable knowledge, skills, and abilities have been achieved, along with passing of district proficiency exam.

Bilingual, oral and written in Spanish (preferred).

Prior experience working in a school district setting (preferred).

WORKING CONDITIONS

Environmental Conditions:

Office environment.

Physical Conditions:

Essential and marginal functions may require maintaining physical condition necessary for sustained posture in a seated and/or standing position.

JOB PROFILE:

Annual Contract: 12 months

Classified Management & Confidential Employees Salary Schedule: Range 17

Board Approved:

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: November 12, 2023

Attachments: X

From: Katherine Wright, Superintendent

Item Number: 16

Type of item: (Action, Consent Action or Information Only): Action

SUBJECT:

Request to Approve Resolution #857 to Pay Absent Board Member Stone Due to Illness or Injury from the November 14, 2023 Regular Meeting of the Board of Trustees

BACKGROUND:

California Education Code Section 35120(c) provides that a member of the Board of Education may be paid for any meeting when absent if the Board, by resolution duly adopted and included in its Minutes, finds that, at the time of the meeting, the member is performing services outside the meeting for the school district, he or she was ill or on jury duty, or the absence was due to a hardship deemed acceptable by the Board.

STATUS:

Board Member Stone was unable to be present at the November 14, 2023 Regular meeting due to illness or injury.

PRESENTER:

Katherine Wright, Superintendent

OTHER PEOPLE WHO MIGHT BE PRESENT:

N/A

COST AND FUNDING SOURCES:

Regular rate of compensation for the meeting of the Board of Trustees

RECOMMENDATION:

That the Board authorizes the compensation for Board Member Stone for the missed meeting on November 14, 2023

Time allocated: 2 minutes

RIVER DELTA UNIFIED SCHOOL DISTRICT

RESOLUTION NO. 857

RESOLUTION AUTHORIZING PAYMENT TO TRUSTEE ABSENT FROM BOARD MEETING

WHEREAS, California Education Code Section 35120(c) provides that a member of the Board of Education may be paid for any meeting when absent if the Board, by resolution duly adopted and included in its minutes, finds that at the time of the meeting the member is performing services outside the meeting for the school district, he or she was ill or on jury duty, or the absence was due to a hardship deemed acceptable by the Board; and,

WHEREAS, on November 14, 2023, the Board of Education held a meeting; and,

WHEREAS, Board Member Jennifer Stone was unable to be present at the meeting; and,

WHEREAS, the Board has determined that Board Member Jennifer Stone was absent due to a hardship caused by illness or injury.

NOW, THEREFORE, BE IT RESOLVED the Board of Trustees of the River Delta Unified School District authorizes Board Member Jennifer Stone shall be paid at the regular rate of compensation for the meeting of the Board of Trustees held on November 14, 2023.

PASSED AND ADOPTED the 12th day of December 2023, by the Board of Trustees of the River Delta Unified School District of Sacramento County, California, by the following roll call vote:

AYES:
NOES:
ABSENT:
ABSTENTIONS:

IN WITNESS WHEREOF, I, Randall Jelly, Clerk of the Board of Trustees of the River Delta Unified School District of Sacramento County, California, certify that the foregoing is a full, true, and correct copy of Resolution No. 857 adopted by the said Board at a Regular Business meeting thereof held at a regular public place of meeting and the resolution is on file in the office of said Board.

Randall Jelly, Clerk
Board of Trustees
River Delta Unified School District

December 12, 2023
(Date)

ATTEST:

Katherine Wright, Secretary of the Board of Trustees
and Superintendent of the
River Delta Unified School District

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: X

From: Tammy Busch, Asst. Supt. of Business Services

Item Number: 17

Type of item: (Action, Consent Action or Information Only): Action

SUBJECT:

Request the Board's Direction on the Proposal from Syserco Energy Solutions

BACKGROUND:

The Board approved a Letter of Intent with Syserco Energy Solutions on February 21, 2023, to conduct a solar feasibility analysis and complete the interconnect application. The cost was not to exceed \$33,500 for this work.

Syserco Energy Solutions has completed an in-depth analysis and presented their findings at the November 14, 2023 Board meeting. The cost for each type of work is as follows:

Solar for a cost of \$9,106,947; AC units at \$2,650,690; sports lighting at \$1,471,451; building lighting at \$1,171,953; power transformers at \$403,521; new BMS at \$321,893; building envelopes at \$205,596; and plug load controllers at \$48,576. The total cost of all these elements is \$15,380,627.

On November 14, 2023 Syserco Energy Solutions has presented several option plans for the Board to consider.

STATUS:

The Superintendent and the Cabinet have discussed the District's future financial obligations. After extensive analysis of the District's financials over the next five years and consultation with our financial advisors, it has been determined that risk tolerance is on the down side.

Committing to an additional \$15,380,627 financial obligation would put our current positive budget status at high risk.

PRESENTER:

Tammy Busch, Asst. Supt. of Business Services

OTHER PEOPLE WHO MIGHT BE PRESENT:

COST AND FUNDING SOURCES:

RECOMMENDATION:

That the Board approves only the types of work in the Syserco Energy Solutions proposal that can be covered by funding provided to the District through the CALSHAPE grant.

Time allocated: 5 minutes

River Delta Unified School District		Project Savings				Project Costs			Project Savings	Cash Position		
Preliminary Cash Flow Analysis		Year	Cumming Approved Energy Savings	Incentives	Projected O&M Savings	Total Program Savings	Estimated Lease Payment	PV O&M			Total Program Costs	
Project Cost	\$11,283,869	Year 1	\$488,817	\$3,541,845	\$0	\$4,030,663	\$4,029,180	\$25,036	\$4,054,216	-\$23,553	-\$23,553	
Customer Contribution	\$0	Year 2	\$511,643		\$0	\$511,643	\$509,409	\$25,787	\$535,196	-\$23,553	-\$47,106	
Financing Fees <i>(Estimated to be 0.5%. Actual = TBD)</i>		Year 3	\$535,535		\$0	\$535,535	\$532,528	\$26,560	\$559,088	-\$23,553	-\$70,659	
	\$135,000	Year 4	\$560,545		\$0	\$560,545	\$556,740	\$27,357	\$584,098	-\$23,553	-\$94,213	
Amount to be Financed	\$11,418,869	Year 5	\$586,724		\$0	\$586,724	\$582,099	\$28,178	\$610,277	-\$23,553	-\$117,766	
Inflation Reduction Act (Solar)*		Year 6	\$614,127		\$0	\$614,127	\$608,657	\$29,023	\$637,680	-\$23,553	-\$141,319	
	\$8,614,178	Year 7	\$642,812		\$0	\$642,812	\$636,471	\$29,894	\$666,365	-\$23,553	-\$164,872	
	29.45%	Year 8	\$672,839		\$0	\$672,839	\$665,601	\$30,791	\$696,392	-\$23,553	-\$188,425	
<i>*IRA Solar Incentive is an Estimate - SES is not a Financial Advisor</i>		Year 9	\$704,270		\$0	\$704,270	\$696,109	\$31,715	\$727,824	-\$23,553	-\$211,978	
SMUD Incentives	\$ -	Year 10	\$737,172		\$0	\$737,172	\$728,059	\$32,666	\$760,725	-\$23,553	-\$235,532	
CALSHAPE Ventilation Incentives	\$ 556,925	Year 11	\$771,613		\$0	\$771,613	\$761,520	\$33,646	\$795,166	-\$23,553	-\$259,085	
CALSHAPE Plumbing Incentives - Est.	\$ 448,045	Year 12	\$807,665		\$0	\$807,665	\$796,563	\$34,655	\$831,218	-\$23,553	-\$282,638	
Total Grants and Incentives	\$ 3,541,845	Year 13	\$845,404		\$0	\$845,404	\$833,262	\$35,695	\$868,957	-\$23,553	-\$306,191	
Construction Duration (months)	18	Year 14	\$884,909		\$0	\$884,909	\$871,696	\$36,766	\$908,462	-\$23,553	-\$329,744	
Finance Term (Years)	20	Year 15*	\$926,262		\$0	\$926,262	\$837,594	\$112,222	\$949,816	-\$23,553	-\$353,297	
Estimated Annual Interest Rate	6.000%	Year 16	\$969,551		\$0	\$969,551	\$954,099	\$39,005	\$993,104	-\$23,553	-\$376,851	
Annual Escalation of Electricity Cost	5.00%	Year 17	\$1,014,866		\$0	\$1,014,866	\$998,244	\$40,175	\$1,038,419	-\$23,553	-\$400,404	
Annual Escalation of O&M Cost/Savings	3.00%	Year 18	\$1,062,301		\$0	\$1,062,301	\$1,044,474	\$41,380	\$1,085,854	-\$23,553	-\$423,957	
		Year 19	\$1,111,957		\$0	\$1,111,957	\$1,092,888	\$42,622	\$1,135,510	-\$23,553	-\$447,510	
Year 15* - Inverter Replacment shown in cashflow		Year 20	\$1,163,937		\$1	\$1,163,938	\$1,143,590	\$43,900	\$1,187,491	-\$23,553	-\$471,063	
		End of NEM2	Year 21	\$544,451		\$0	\$544,451	\$0	\$45,217	\$45,217	\$499,233	\$28,170
			Year 22	\$569,386		\$0	\$569,386	\$0	\$46,574	\$46,574	\$522,812	\$550,982
			Year 23	\$595,464		\$0	\$595,464	\$0	\$47,971	\$47,971	\$547,493	\$1,098,475
			Year 24	\$622,737		\$0	\$622,737	\$0	\$49,410	\$49,410	\$573,326	\$1,671,802
			Year 25	\$651,258		\$0	\$651,258	\$0	\$50,893	\$50,893	\$600,365	\$2,272,167
			Year 26	\$681,085		\$0	\$681,085	\$0	\$52,419	\$52,419	\$628,666	\$2,900,833
			Year 27	\$712,279		\$0	\$712,279	\$0	\$53,992	\$53,992	\$658,287	\$3,559,120
			Year 28	\$744,902		\$0	\$744,902	\$0	\$55,612	\$55,612	\$689,290	\$4,248,410
			Year 29	\$779,018		\$0	\$779,018	\$0	\$57,280	\$57,280	\$721,738	\$4,970,148
			Year 30	\$814,697		\$0	\$814,697	\$0	\$58,998	\$58,998	\$755,699	\$5,725,847
		Totals	\$22,328,227	\$3,541,845	\$1	\$25,870,072	\$18,878,785	\$1,265,441	\$20,144,226	\$5,725,847		

Financials – Option 1 – No Sports Lighting, No Building Envelope, No BMS Controls Upgrades



River Delta Unified School District		Project Savings						Project Costs			Annual Cash Flow	Cumulative Cash Flow	
Preliminary Cash Flow Analysis		Year	FY Year	FY Year Beginning July 1	Approved Energy Savings	Incentives	Projected O&M Savings	Total Program Savings	Estimated Financing Payments ³	PV O&M			Total Program Costs
Project Cost	\$13,381,687	Year 1	FY 25-26	7/1/2025	\$564,046	\$3,548,177	\$93,550	\$4,205,772	\$4,179,537	\$25,036	\$4,204,573	\$1,199	\$1,199
Customer Contribution	\$0	Year 2	FY 26-27	7/1/2026	\$590,632		\$96,356	\$686,989	\$660,111	\$25,787	\$685,898	\$1,091	\$2,290
Financing Fees (Estimated to be 0.5%. Actual = TBD)		Year 3	FY 27-28	7/1/2027	\$618,474		\$99,247	\$717,721	\$690,021	\$26,560	\$716,581	\$1,140	\$3,430
Costs of Issuance ¹	\$135,000	Year 4	FY 28-29	7/1/2028	\$647,631		\$102,225	\$749,855	\$721,306	\$27,357	\$748,663	\$1,192	\$4,622
Amount to be Financed	\$13,516,687	Year 5	FY 29-30	7/1/2029	\$678,164		\$105,291	\$783,455	\$754,032	\$28,178	\$782,210	\$1,245	\$5,867
Inflation Reduction Act (Solar)*		Year 6	FY 30-31	7/1/2030	\$710,139		\$108,450	\$818,590	\$788,264	\$29,023	\$817,287	\$1,302	\$7,169
	\$8,614,178	Year 7	FY 31-32	7/1/2031	\$743,625		\$111,704	\$855,329	\$824,073	\$29,894	\$853,967	\$1,362	\$8,531
	29.45%	Year 8	FY 32-33	7/1/2032	\$778,693		\$115,055	\$893,747	\$861,533	\$30,791	\$892,324	\$1,423	\$9,954
	\$ 2,536,875	Year 9	FY 33-34	7/1/2033	\$815,417		\$118,506	\$933,923	\$900,720	\$31,715	\$932,435	\$1,488	\$11,443
*IRA Solar Incentive is an Estimate - SES is not a Financial Advisor		Year 10	FY 34-35	7/1/2034	\$853,876		\$122,061	\$975,937	\$941,715	\$32,666	\$974,381	\$1,556	\$12,999
SMUD Incentives	\$ 6,332	Year 11	FY 35-36	7/1/2035	\$894,152		\$125,723	\$1,019,875	\$984,602	\$33,646	\$1,018,248	\$1,627	\$14,626
CALSHAPE Ventilation Incentives	\$ 556,925	Year 12	FY 36-37	7/1/2036	\$936,331		\$129,495	\$1,065,826	\$1,029,469	\$34,655	\$1,064,124	\$1,701	\$16,327
CALSHAPE Plumbing Incentives - Est.	\$ 448,045	Year 13	FY 37-38	7/1/2037	\$953,459		\$133,380	\$1,086,839	\$1,049,409	\$35,695	\$1,085,104	\$1,734	\$18,062
Total Grants and Incentives	\$ 3,548,177	Year 14	FY 38-39	7/1/2038	\$998,366		\$137,381	\$1,135,747	\$1,097,168	\$36,766	\$1,133,934	\$1,814	\$19,875
Construction Duration (months)	18	Year 15*	FY 39-40	7/1/2039	\$1,045,392		\$141,503	\$1,186,895	\$1,072,900	\$112,222	\$1,185,122	\$1,773	\$21,649
Finance Term (Years)	20	Year 16	FY 40-41	7/1/2040	\$1,094,638		\$145,748	\$1,240,385	\$1,199,398	\$39,005	\$1,238,403	\$1,982	\$23,631
Assumed Annual Interest Rate ²	6.000%	Year 17	FY 41-42	7/1/2041	\$1,146,206		\$150,120	\$1,296,327	\$1,254,079	\$40,175	\$1,294,254	\$2,073	\$25,703
Annual Escalation of Electricity Cost	5.00%	Year 18	FY 42-43	7/1/2042	\$1,200,209		\$154,624	\$1,354,833	\$1,311,285	\$41,380	\$1,352,665	\$2,167	\$27,871
Annual Escalation of O&M Cost/Savings	3.00%	Year 19	FY 43-44	7/1/2043	\$1,256,760		\$159,263	\$1,416,022	\$1,371,134	\$42,622	\$1,413,756	\$2,267	\$30,138
		Year 20	FY 44-45	7/1/2044	\$1,315,981		\$164,041	\$1,480,022	\$1,433,751	\$43,900	\$1,477,651	\$2,370	\$32,508
		Year 21	FY 45-46	7/1/2045	\$611,854		\$0	\$611,854	\$0	\$45,217	\$45,217	\$566,636	\$599,144
		Year 22	FY 46-47	7/1/2046	\$640,160		\$0	\$640,160	\$0	\$46,574	\$46,574	\$593,586	\$1,192,730
		Year 23	FY 47-48	7/1/2047	\$669,776		\$0	\$669,776	\$0	\$47,971	\$47,971	\$621,805	\$1,814,535
		Year 24	FY 48-49	7/1/2048	\$700,764		\$0	\$700,764	\$0	\$49,410	\$49,410	\$651,354	\$2,465,889
		Year 25	FY 49-50	7/1/2049	\$733,187		\$0	\$733,187	\$0	\$50,893	\$50,893	\$682,294	\$3,148,183
		Year 26	FY 50-51	7/1/2050	\$767,111		\$0	\$767,111	\$0	\$52,419	\$52,419	\$714,692	\$3,862,875
		Year 27	FY 51-52	7/1/2051	\$802,606		\$0	\$802,606	\$0	\$53,992	\$53,992	\$748,614	\$4,611,489
		Year 28	FY 52-53	7/1/2052	\$839,745		\$0	\$839,745	\$0	\$55,612	\$55,612	\$784,133	\$5,395,622
		Year 29	FY 53-54	7/1/2053	\$878,603		\$0	\$878,603	\$0	\$57,280	\$57,280	\$821,323	\$6,216,945
		Year 30	FY 54-55	7/1/2054	\$919,262		\$0	\$919,262	\$0	\$58,998	\$58,998	\$860,263	\$7,077,208
		Totals			\$25,405,257	\$3,548,177	\$2,513,723	\$31,467,157	\$23,124,507	\$1,265,441	\$24,389,948	\$7,077,208	

¹ BFS/JPA assumption/estimate based on market research and/or experience.

² Assumed interest rate based on estimated current market interest rate of 5.25% as of October 2023 (BFS/JPA estimate based on current market conditions and experience) + 75 basis points (0.75%) timing adjustment to account for potential increase in interest rates. Timing adjustment based on approximately 93% correlation over an approximately eight month period assuming sale in or around mid-2024 (based on historical Bond Buyer Index data as of 10/6/23).

³ Estimated Financing Payments include debt service and debt administration costs (which are assumed to be 31.625 in year 1 and increase 3% annually).

⁴ "NPV" (Net Present Value) analysis measures the value of future nominal dollars in today's dollars. Further, the Proposition 53 California Clean Energy Jobs Act 2017 Program Implementation Guidelines (2017 Guidelines) calls for a net present value calculation. A 3% discount rate is used because per page 17 of the Time Dependent Valuation of Energy for Developing Building Energy Efficiency Standards report cited in footnote 7 on page D-2 of the 2017 Guidelines. (The NPV is calculated by applying a 3% real (inflation adjusted) discount rate ...)

Financials – Option 2 – No Sports Lighting



River Delta Unified School District		Project Savings						Project Costs			Annual Cash Flow	Cumulative Cash Flow
Preliminary Cash Flow Analysis		Year	FY Year Beginning July 1	Cumming Approved Energy Savings	Incentives	Projected O&M Savings	Total Program Savings	Estimated Financhg Payments ³	PV O&M	Total Program Costs		
Project Cost	\$13,909,176	Year 1	FY 25-26 7/1/2025	\$579,951	\$3,563,781	\$103,602	\$4,247,335	\$4,233,801	\$25,036	\$4,258,837	-\$11,502	-\$11,502
Customer Contribution	\$0		26-27 7/1/2026	\$607,333		\$106,911	\$714,244	\$699,860	\$25,787	\$725,647	-\$11,403	-\$22,905
Financing Fees (Estimated to be 0.5%. Actual = TBD)		Year 3	FY 27-28 7/1/2027	\$636,010		\$110,330	\$746,340	\$731,701	\$26,580	\$758,281	-\$11,922	-\$34,826
Costs of Issuance ¹	\$135,000		28-29 7/1/2028	\$666,043		\$113,861	\$779,905	\$765,012	\$27,357	\$792,369	-\$12,465	-\$47,291
Amount to be Financed	\$14,044,176	Year 5	FY 29-30 7/1/2029	\$697,497		\$117,510	\$815,007	\$799,863	\$28,178	\$828,041	-\$13,034	-\$60,325
Inflation Reduction Act (Solar)*			30-31 7/1/2030	\$730,439		\$121,280	\$851,719	\$836,324	\$29,023	\$865,347	-\$13,628	-\$73,953
	\$8,614,178	Year 7	FY 31-32 7/1/2031	\$764,940		\$125,174	\$890,115	\$874,471	\$29,894	\$904,365	-\$14,250	-\$88,204
	29.45% \$ 2,536,875		32-33 7/1/2032	\$801,073		\$129,199	\$930,273	\$914,383	\$30,791	\$945,174	-\$14,901	-\$103,105
*IRA Solar Incentive is an Estimate - SEE is not a Financial Advisor		Year 9	FY 33-34 7/1/2033	\$838,917		\$133,358	\$972,275	\$956,142	\$31,715	\$987,857	-\$15,582	-\$118,687
SMUD Incentives	\$ 21,936		34-35 7/1/2034	\$878,550		\$137,656	\$1,016,206	\$999,835	\$32,666	\$1,032,501	-\$16,295	-\$134,982
CALSHAPE Ventilation Incentives	\$ 556,925	Year 11	FY 35-36 7/1/2035	\$920,060		\$142,097	\$1,062,158	\$1,045,552	\$33,646	\$1,079,198	-\$17,040	-\$152,022
CALSHAPE Plumbing Incentives - Est.	\$ 448,045		36-37 7/1/2036	\$953,524		\$146,688	\$1,100,211	\$1,083,210	\$34,655	\$1,117,865	-\$17,654	-\$169,676
Total Grants and Incentives	\$ 3,563,781	Year 13	FY 37-38 7/1/2037	\$971,511		\$151,432	\$1,122,943	\$1,105,261	\$35,695	\$1,140,956	-\$18,013	-\$187,689
Construction Duration (months)	18		38-39 7/1/2038	\$1,017,321		\$156,336	\$1,173,657	\$1,155,728	\$36,766	\$1,192,494	-\$18,837	-\$206,526
Finance Term (Years)	20	Year 15*	FY 39-40 7/1/2039	\$1,065,295		\$161,405	\$1,226,701	\$1,132,942	\$112,222	\$1,245,164	-\$18,463	-\$224,989
Assumed Annual Interest Rate ²	6.000%		40-41 7/1/2040	\$1,094,638		\$145,748	\$1,240,385	\$1,221,285	\$39,005	\$1,260,290	-\$19,905	-\$244,894
Annual Escalation of Electricity Cost	5.00%	Year 17	FY 41-42 7/1/2041	\$1,146,206		\$150,120	\$1,296,327	\$1,276,964	\$40,175	\$1,317,139	-\$20,812	-\$265,706
Annual Escalation of O&M Cost/Savings	3.00%		42-43 7/1/2042	\$1,200,209		\$154,624	\$1,354,833	\$1,335,215	\$41,380	\$1,376,595	-\$21,763	-\$287,469
¹ BFS/JPA assumption/estimate based on market research and/or experience. ² Assumed interest rate based on estimated current market interest rate of 5.25% as of October 2023 (BFS/JPA estimate based on current market conditions and experience) + 75 basis points (0.75%) timing adjustment to account for potential increase in interest rates. Timing adjustment based on approximately 50% confidence over an approximately eight month period assuming sale in or around mid-2024 (based on historical <i>Sand Bay</i> Index data as of 10/6/23). ³ Estimated Financing Payments include debt service and debt administration costs (which are assumed to be \$1,625 in year 1 and increase 3% annually). ⁴ "NPV" (Net Present Value) analysis measures the value of future nominal dollars in today's dollars. Further, the <i>Proposition 39-California Clean Energy Jobs Act 2017 Program Implementation Guidelines (2017 Guidelines)</i> calls for a net present value calculation. A 3% discount rate is used because per page 17 of the <i>Time Dependent Valuation of Energy for Developing Building Energy Efficiency Standards</i> report cited in footnote 7 on page D-2 of the <i>2017 Guidelines</i> . "[T]he NPV is calculated by applying a 3% real (inflation adjusted) discount rate ...".	Year 19	FY 43-44 7/1/2043	\$1,256,760		\$159,263	\$1,416,022	\$1,396,158	\$42,622	\$1,438,780	-\$22,757	-\$310,226	
		44-45 7/1/2044	\$1,315,981		\$164,041	\$1,480,022	\$1,459,918	\$43,900	\$1,503,818	-\$23,797	-\$334,023	
	Year 21	FY 45-46 7/1/2045	\$611,854		\$0	\$611,854	\$0	\$45,217	\$45,217	\$566,636	\$232,613	
		46-47 7/1/2046	\$640,160		\$0	\$640,160	\$0	\$46,574	\$46,574	\$593,586	\$826,199	
	Year 23	FY 47-48 7/1/2047	\$669,776		\$0	\$669,776	\$0	\$47,971	\$47,971	\$621,805	\$1,446,004	
		48-49 7/1/2048	\$700,764		\$0	\$700,764	\$0	\$49,410	\$49,410	\$651,354	\$2,099,358	
	Year 25	FY 49-50 7/1/2049	\$733,187		\$0	\$733,187	\$0	\$50,893	\$50,893	\$682,294	\$2,781,653	
		50-51 7/1/2050	\$767,111		\$0	\$767,111	\$0	\$52,419	\$52,419	\$714,692	\$3,496,344	
	Year 27	FY 51-52 7/1/2051	\$802,606		\$0	\$802,606	\$0	\$53,992	\$53,992	\$748,614	\$4,244,958	
		52-53 7/1/2052	\$839,745		\$0	\$839,745	\$0	\$55,612	\$55,612	\$784,133	\$5,029,091	
Year 29	FY 53-54 7/1/2053	\$878,603		\$0	\$878,603	\$0	\$57,280	\$57,280	\$821,323	\$5,850,414		
	54-55 7/1/2054	\$919,262		\$0	\$919,262	\$0	\$58,998	\$58,998	\$860,263	\$6,710,678		
Totals				\$25,705,327	\$3,563,781	\$2,730,636	\$31,999,744	\$24,023,625	\$1,265,441	\$25,289,066	\$6,710,678	

Financials – Option 3 – Full Scope of Work



River Delta Unified School District		Project Savings						Project Costs			Annual Cash Flow	Cumulative Cash Flow	
Preliminary Cash Flow Analysis		Year	FY Year Beginning July 1	Cumming Approved Energy Savings	Incentives	Projected O&M Savings	Total Program Savings	Estimated Financing Payments ³	PV O&M	Total Program Costs			
Project Cost	\$15,380,627	Year 1	FY 25-26	7/1/2025	\$581,478	\$3,563,781	\$106,830	\$4,252,090	\$4,327,431	\$25,036	\$4,352,467	-\$100,377	-\$100,377
Customer Contribution	\$0	Year 2	FY 26-27	7/1/2026	\$608,937		\$110,236	\$719,173	\$796,186	\$25,787	\$821,973	-\$102,800	-\$203,177
Financing Fees <i>(Estimated to be 0.5%, Actual = TBD)</i>		Year 3	FY 27-28	7/1/2027	\$637,694		\$113,754	\$751,448	\$832,362	\$26,560	\$858,922	-\$107,475	-\$310,652
Costs of Issuance ¹	\$135,000	Year 4	FY 28-29	7/1/2028	\$667,811		\$117,388	\$785,200	\$870,207	\$27,357	\$897,564	-\$112,365	-\$423,016
Amount to be Financed	\$15,515,627	Year 5	FY 29-30	7/1/2029	\$699,354		\$121,143	\$820,497	\$909,799	\$28,178	\$937,977	-\$117,480	-\$540,497
Inflation Reduction Act (Solar)*		Year 6	FY 30-31	7/1/2030	\$732,389		\$125,021	\$857,410	\$951,219	\$29,023	\$980,242	-\$122,832	-\$663,329
	\$8,614,178	Year 7	FY 31-32	7/1/2031	\$766,987		\$129,029	\$896,016	\$994,553	\$29,894	\$1,024,447	-\$128,431	-\$791,760
	29.45% \$ 2,536,875	Year 8	FY 32-33	7/1/2032	\$803,223		\$133,169	\$936,391	\$1,039,891	\$30,791	\$1,070,682	-\$134,290	-\$926,051
<i>*IRA Solar Incentive is an Estimate - SEE is not a Financial Advisor</i>		Year 9	FY 33-34	7/1/2033	\$841,173		\$137,447	\$978,620	\$1,087,325	\$31,715	\$1,119,040	-\$140,420	-\$1,066,471
SMJD Incentives	\$ 21,936	Year 10	FY 34-35	7/1/2034	\$880,920		\$141,867	\$1,022,787	\$1,136,955	\$32,666	\$1,169,621	-\$146,834	-\$1,213,304
CALSHAPE Ventilation Incentives	\$ 556,925	Year 11	FY 35-36	7/1/2035	\$922,548		\$146,435	\$1,068,983	\$1,188,881	\$33,646	\$1,222,527	-\$153,544	-\$1,366,848
CALSHAPE Plumbing Incentives - Est.	\$ 448,045	Year 12	FY 36-37	7/1/2036	\$956,136		\$151,156	\$1,107,292	\$1,231,714	\$34,655	\$1,266,369	-\$159,078	-\$1,525,926
Total Grants and Incentives	\$ 3,563,781	Year 13	FY 37-38	7/1/2037	\$974,254		\$156,034	\$1,130,288	\$1,256,924	\$35,695	\$1,292,619	-\$162,331	-\$1,688,257
Construction Duration (months)	18	Year 14	FY 38-39	7/1/2038	\$1,020,201		\$161,076	\$1,181,277	\$1,314,251	\$36,766	\$1,351,017	-\$169,739	-\$1,857,996
Finance Term (Years)	20	Year 15*	FY 39-40	7/1/2039	\$1,068,319		\$166,288	\$1,234,607	\$1,288,825	\$112,222	\$1,401,047	-\$166,440	-\$2,024,436
Assumed Annual Interest Rate ²	6.000%	Year 16	FY 40-41	7/1/2040	\$1,097,813		\$150,777	\$1,248,589	\$1,388,973	\$39,005	\$1,427,978	-\$179,389	-\$2,203,825
Annual Escalation of Electricity Cost	5.00%	Year 17	FY 41-42	7/1/2041	\$1,149,540		\$155,300	\$1,304,840	\$1,452,228	\$40,175	\$1,492,403	-\$187,563	-\$2,391,388
Annual Escalation of O&M Cost/Savings	3.00%	Year 18	FY 42-43	7/1/2042	\$1,203,709		\$159,959	\$1,363,668	\$1,518,403	\$41,380	\$1,559,783	-\$196,115	-\$2,587,503
¹ GFSJPA assumption/estimate based on market research and/or experience.		Year 19	FY 43-44	7/1/2043	\$1,260,436		\$164,758	\$1,425,193	\$1,587,634	\$42,622	\$1,630,256	-\$205,063	-\$2,792,565
² Assumed interest rate based on estimated current market interest rate of 5.25% as of October 2023 (GFSJPA estimate based on current market conditions and experience) - 75 basis points (0.75%) timing adjustment to account for potential increase in interest rates. Timing adjustment based on approximately 90% confidence over an approximately eight month period assuming sale in or around mid-2024 (based on historical <i>Bond Buyer Index</i> data as of 10/6/23).		Year 20	FY 44-45	7/1/2044	\$1,319,840		\$169,701	\$1,489,541	\$1,660,064	\$43,900	\$1,703,964	-\$214,423	-\$3,006,989
³ Estimated Financing Payments include debt service and debt administration costs (which are assumed to be \$16,225 in year 1 and increase 3% annually).		Year 21	FY 45-46	7/1/2045	\$615,906		\$5,660	\$621,566	\$0	\$45,217	\$45,217	\$576,349	-\$2,430,640
⁴ "NPV" (Net Present Value) analysis measures the value of future nominal dollars in today's dollars. Further, the <i>Proposition 39: California Clean Energy Jobs Act 2017 Program Implementation Guidelines (2017 Guidelines)</i> calls for a net present value calculation. A 3% discount rate is used because per page 17 of the <i>Time Dependent Valuation of Energy for Developing Building Energy Efficiency Standards</i> report cited in footnote 7 on page D-2 of the 2017 Guidelines: "[t]he NPV is calculated by applying a 3% real (inflation adjusted) discount rate ...".		Year 22	FY 46-47	7/1/2046	\$644,415		\$5,830	\$650,245	\$0	\$46,574	\$46,574	\$603,671	-\$1,826,969
		Year 23	FY 47-48	7/1/2047	\$674,244		\$6,005	\$680,249	\$0	\$47,971	\$47,971	\$632,278	-\$1,194,692
		Year 24	FY 48-49	7/1/2048	\$705,455		\$6,185	\$711,640	\$0	\$49,410	\$49,410	\$662,230	-\$532,462
		Year 25	FY 49-50	7/1/2049	\$738,113		\$6,370	\$744,483	\$0	\$50,893	\$50,893	\$693,590	-\$161,129
		Year 26	FY 50-51	7/1/2050	\$772,283		\$6,561	\$778,844	\$0	\$52,419	\$52,419	\$726,425	\$887,554
		Year 27	FY 51-52	7/1/2051	\$808,037		\$6,758	\$814,795	\$0	\$53,992	\$53,992	\$760,803	\$1,648,357
		Year 28	FY 52-53	7/1/2052	\$845,447		\$6,961	\$852,408	\$0	\$55,612	\$55,612	\$796,796	\$2,445,153
		Year 29	FY 53-54	7/1/2053	\$884,591		\$7,170	\$891,761	\$0	\$57,280	\$57,280	\$834,480	\$3,279,633
		Year 30	FY 54-55	7/1/2054	\$925,548		\$7,385	\$932,933	\$0	\$58,998	\$58,998	\$873,935	\$4,153,568
		Totals			\$25,806,800	\$3,563,781	\$2,882,252	\$32,252,834	\$26,833,825	\$1,265,441	\$28,099,266	\$4,153,568	

Project Options – Financial Summary



Option 1

Total Net Savings - 30 Years:	\$7,077,208
NPV Savings at 3% ⁴ :	\$3,313,066
Investment Tax Credit (ITC):	\$2,536,875
Net Savings Without ITC:	\$776,191

Option 2

Total Net Savings - 30 Years:	\$6,710,678
NPV Savings at 3% ⁴ :	\$3,050,653
Investment Tax Credit (ITC):	\$2,536,875
Net Savings Without ITC:	\$513,778

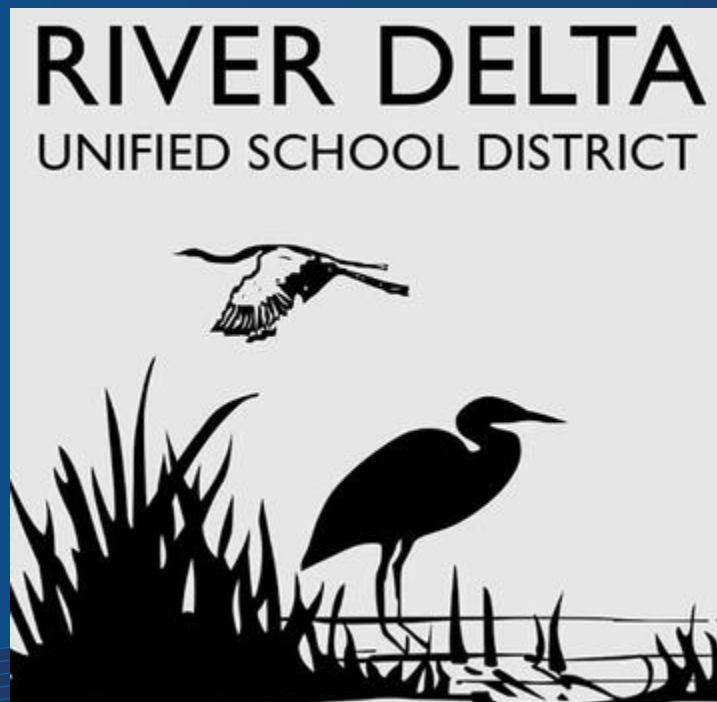
Option 3

Total Net Savings - 30 Years:	\$4,153,568
NPV Savings at 3% ⁴ :	\$1,191,755
Investment Tax Credit (ITC):	\$2,536,875
Net Savings Without ITC:	(\$1,345,120)

*Additional Renewable Energy Certificates available, possibly adding about \$20,000 per year in incentives.

ENERGY SERVICES PROPOSAL – EXHIBIT A

Prepared for the River Delta Unified School District



Date Submitted:

Nov 14, 2023

Presented by:

Syserco Energy Solutions, Inc.

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Executive Summary

River Delta Unified School District (District) selected Syserco Energy Solutions, Inc. (SES), a qualified Energy Services Company, to develop a District-wide, comprehensive energy services project. The process of developing the energy conservation measures (ECMs) for the District involved performing an Investment Grade Audit (IGA) at the majority of the District-owned facilities. The IGA established a historical energy and utility baseline and identified a comprehensive list of ECMs that would provide the best overall value to the District.

We are pleased to present the following energy efficiency and facility enhancement project to the District.

The primary goals of this project are:

1. Reduce energy consumption across District-owned infrastructure.
2. Reduce the District’s ongoing utility and operational costs.
3. Reduce overall District greenhouse gas emissions (GHGs).
4. Upgrade aging infrastructure by improving efficiencies of existing equipment and systems.
5. Create safer and more comfortable conditions for District staff and the general public.

The following table is the firm-fixed Project Cost and estimated utility and operational savings.

Total Project Cost	\$15,380,628*
Investment Tax Credit (IRA ITC) (Est.)	\$2,196,615**
Energy Community Tax Credit Bonus (Est.)	\$305,035**
CALSHAPE HVAC and PLUMBING Grant	\$1,004,970**
SMUD Incentives (Est.)	\$21,936**
Net Project Cost	\$11,816,846
Year 1 Energy Savings	\$587,043
Year 1 Operational Savings	\$102,456
Year 1 Total Savings	\$680,499

30-YEAR CUMULATIVE SAVINGS*** = \$28,474,526

**Pricing assumes the Board of Trustees approves this project at a regularly scheduled public hearing in calendar year 2023, public notice of which is given at least two weeks in advance. Pricing may be subject to change if the approval is delayed.*

***Values are estimated and not guaranteed.*

****Projected energy reduction and cost avoidance figures are calculated based upon existing building occupancy, operation, and stipulated assumptions of performance. All calculations are based upon industry best practices and methodologies. Based on 5% estimated annual utility cost escalation and 3% annual operational cost escalation.*

Section 1 – Introduction

We are pleased to present this Energy Services Proposal (proposal) to River Delta Unified School District (District) for the purpose of implementing the recommended renewable energy measures and energy conservation measures (ECMs) at the District’s various facilities.

The intent of this proposal is to summarize the project scope of work, cost, and savings for a comprehensive Energy Services project. The project will result in updated existing systems, improved occupant comfort, reduced utility consumption, and ongoing operational cost reduction. By implementing this self-funding project, the District will avoid future capital cost requirements and minimize the impact on the District’s future Capital Improvement Plan (CIP) budgeting requirements.

To develop the recommended project, our experienced energy engineers, project managers, and project developers examined existing systems and equipment through a detailed energy and operational audit of the District’s facilities to determine the full potential for savings. This proposal is a culmination of our audit findings, recommended measures, infrastructure enhancements, operational savings, and overall cost reductions. We have investigated multiple means for accomplishing this goal, including retrofitting equipment or installation of new devices and employing enhanced strategies to improve operational efficiency.

1.1 Approach

The project development process involved numerous site visits, interaction with District administration and facilities staff, a detailed analysis of existing equipment and systems, current utility consumption, and any available logs and profiles of equipment. Studies of energy usage, operating conditions, and interviews with the facility personnel have been valuable sources of information, contributing greatly to this effort. We have taken into consideration the input provided by District staff have integrated the various infrastructure needs of the District through the proposed ECMs.

Section 2 – Scope of Work

2.1 Energy Conservation Measure (ECM) Summary

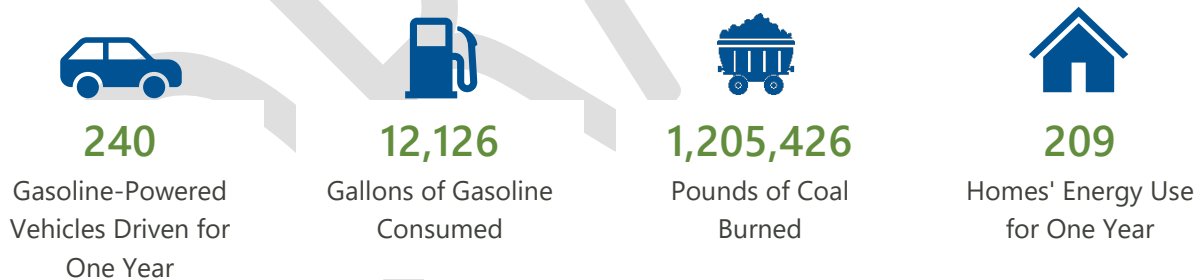
For the detailed scope of work descriptions please refer to the “2.5 ECM Descriptions and Detailed Scopes of Work” section.

The following tables show the description of energy savings and GHG Reduction.

Site Name	Elec Savings (kWh/yr)	Gas Savings (therms/yr)	Elec Cost Savings (\$/yr)	Gas Cost Savings (\$/yr)	Total Cost Savings (\$/yr)
Delta High School - Main Meter	452,640	193	\$128,222	\$239	\$128,461
Delta High School - Old Meter	0	0	\$0	\$0	\$0
Delta High School - Pump and Lights	0	0	\$0	\$0	\$0
Clarksburg Middle School	92,055	9	\$32,526	\$11	\$32,537
Bates Elementary School	270,940	178	\$30,694	\$0	\$30,694
Walnut Grove Elementary School-South Meter	287,024	45	\$29,788	\$0	\$29,788
Walnut Grove Elementary School-North Meter	27,945	43	\$4,713	\$0	\$4,713
Isleton Elementary School	165,718	629	\$47,541	\$801	\$48,343
DH White Elementary School	356,698	66	\$104,697	\$0	\$104,697
District Office	18,337	32	\$6,908	\$44	\$6,952
Rio Vista High School	554,339	407	\$152,391	\$511	\$152,902
Rio Vista High School - Sports Lighting	4,475	0	\$1,513	\$0	\$1,513
River View Middle School	139,861	99	\$40,747	\$132	\$40,879
Totals	2,370,032	1,701	\$579,740	\$1,738	\$581,478

Site Name	Total Emissions Savings (mtCO ₂ /yr)	Gas-Powered Vehicles Driven per year	Gallons of Gasoline Consumed	Pounds of Coal Burned per year	Homes Energy Use for one year
Delta High School - Main Meter	205	46	23,054	229,434	40
Delta High School - Old Meter	0	0	0	0	0
Delta High School - Pump and Lights	0	0	0	0	0
Clarksburg Middle School	42	9	4,671	46,481	8
Bates Elementary School	123	27	13,837	137,707	24
Walnut Grove Elementary School-South Meter	130	29	14,572	145,022	25
Walnut Grove Elementary School-North Meter	13	3	1,442	14,350	2
Isleton Elementary School	78	17	8,774	87,322	15
DH White Elementary School	161	36	18,116	180,288	31
District Office	8	2	948	9,437	2
Rio Vista High School	252	56	28,336	281,999	49
Rio Vista High School - Sports Lighting	2	0	227	2,257	0
River View Middle School	64	14	7,147	71,127	12
Totals	1,076	240	121,126	1,205,426	209

For comparison, 1,076 metric tons of Carbon Dioxide (CO₂) is equivalent to greenhouse gas emissions from:



The projected energy reduction and cost avoidance figures were calculated based upon existing building occupancy, operation, and stipulated assumptions of performance. Legacy utility billing was derived from District-generated reports and data provided directly by Pacific Gas and Electric (PG&E) and Sacramento Municipal Utility District (SMUD). All calculations are based on industry best practices and methodologies.

2.1.1 Energy Tax Savers Services

SES will be responsible for the following support to the District:

Federal Investment Tax Credit

- Work with District to prepare all documentation required for pre-filing.
- Assist District in pre-filing
- Work with District to prepare all documentation required for filing.
- Assist District in filing

Energy Community Tax Credit Bonus

- Work with District to prepare all documentation required for pre-filing.
- Assist District in pre-filing
- Work with District to prepare all documentation required for filing.
- Assist District in filing

Delivery of these services is predicated on District providing all requested documentation and any follow-up documentation requested. The parties recognize that achievement of these tax benefits requires cooperation from third party designees, the facilities and Business Operations / Finance departments of District. SES will facilitate this cooperation, provide advice throughout the process, and provide IRS audit documentation, verifying all submissions related to the Inflation Reduction Act, as needed, and providing any further calculations requested.

DRAFT

2.2 Clarifications & Exclusions

2.2.1 Clarifications

All work will be performed during regular work hours unless otherwise stated. SES will work closely with District staff to identify work areas that may require after-hours work. We will review the project schedule with District to ensure mutual agreement is reached regarding site access and District-approved work in occupied spaces.

All field craft labor will comply with prevailing wage requirements and current California Department of Industrial Regulations (DIR) standards.

All existing field sensors, valves, actuators, conduit, and wiring will be reused unless specifically stated otherwise.

The District shall provide all required static IP addresses and Ethernet drops for equipment, as applicable and required.

All structural engineering related to the support of mechanical or electrical equipment as identified in this proposal is included; all other structural work is excluded.

The District shall provide a laydown and storage area during the construction period.

All existing curbs/sleepers for rooftop equipment and support structures are assumed to be in good condition and structurally adequate.

All permit drawings required for the execution of the work are included.

It is assumed that the existing piping isolation valves are working properly and are not leaking.

The District shall provide electrical power to operate electrical construction tools and equipment.

This proposal is based on reusing existing electrical circuits unless otherwise stated in the detailed scope of work.

It is assumed that proper grounding exists for all electrical equipment.

Pricing is based on a single-phase project. Multiple phases or extensions to the proposed schedule may constitute a change in the scope of work and the project schedule.

A one (1) year warranty from date of individual ECM substantial completion is included.

The District will provide SES with two (2) sets of master keys during the construction period.

2.2.2 Exclusions

Provision of temporary heating, cooling, fans, and domestic water.

Any repair work for existing systems beyond that which is stated in the ECM scope of work or resolving existing code violations. All existing equipment is assumed to be in good working order and meet code requirements.

Work or other performance requirements shown in any other documents which are not stated in this proposal.

Fire and life safety system programming or related work.

Hazardous material abatement.

2.3 Extent of Subcontracting

We may subcontract portions of work related to this contract to licensed and qualified companies including equipment installation, start-up, and training.

2.4 Project Schedule

As a predecessor milestone, the initial construction schedule start date is based on the execution of the contract. The projected overall project implementation schedule will be developed by our project manager and reviewed with District staff during the construction kickoff meeting.

2.5 ECM Descriptions and Detailed Scope of Work

2.5.1 Introduction

As a result of our project development work, a number of ECMs have been identified to meet the specific needs of each facility. ECM identification and selection is the result of our detailed review of the sites, in conjunction with the District's building plans, specifications, equipment arrangements, and interviews with District staff. These ECMs are intended to enhance the efficiency of the buildings through new equipment and repair, retrofit, and reprogramming of the various systems in each building.

The following section is a detailed description of each proposed ECM. Each description includes the existing conditions, general intent, the benefits of each ECM, impacted equipment, and the detailed scope of work.

2.5.2 Detailed Scope of Work for Energy Efficiency Project

3.0 – Building Automation ECMs

ECM 3.02 – Building Management System Upgrades

General Intent

The District currently employs two (2) central plant systems. Isleton Elementary contains one (1) central plant that operates under an Alerton Direct Digital Controls (DDC) system. After interviewing staff, SES learned that they are unable to access the controls scheduling via the desktop server. This causes the system to operate inefficiently at all hours of the year. Walnut Grove contains the second central plant system that operates under an antiquated pneumatic controls system. After reviewing historical electrical demand interval data, we were able to determine that the system inefficiently operates the south building. The chiller and electrical resistance heaters operate simultaneously which causes demand to spike in the winter months.

Isleton Elementary School is to receive an upgraded Alerton controls platform with new demand-controlled ventilation (DCV) for all spaces. This will allow the system to reduce demand when the independent zones are unoccupied.

Walnut Grove will receive an all new Alerton controls system in place of the old pneumatic controls system to match Isleton's control platform. Walnut Grove's control valves are believed to have asbestos insulation surrounding all piping which will require **abatement**. This is not covered by Syserco Energy Solutions and will require the district to abate all asbestos in working areas before SES starts work.

ECM Benefits

This upgrade initiative represents a significant advancement for the District's mechanical controls system, transitioning it to the latest technology. By adopting an open-source controls platform, this modernization enables District staff and maintenance contractors to have convenient access to alarms and sensors, streamlining the troubleshooting process for any potential issues. This forward-thinking measure empowers the District to efficiently monitor and manage its mechanical systems, ensuring optimal performance and timely resolution of maintenance concerns.

Impacted Equipment

Isleton Elementary School

Replace existing Alerton BCM global controller with an ACM

16 – (UVC-1 thru UVC-16) Replace existing MS-II zone sensors with MS4-THC

16 – (UVC-1 thru UVC-16) Enhance existing program to include CO2 based Demand Control Ventilation (DCV)

2 – (Gym – MP East Side) Unitary controllers, combination zone temperature/humidity/CO2 sensor with LCD, supply air temperature sensors, fan status current switches, hot water temperature control valves and economizer actuators

2 – (Stage – MP West Side) Unitary controllers, combination zone temperature/humidity/CO2 sensor with LCD, supply air temperature sensors, fan status current switches and hot water temperature control valves

1 – (MP Hot Water System) System controller, boiler enable, strap-on hot water supply & return water temperature sensors, heating hot water pump enable & status monitoring, hot water temperature control valve, heat exchanger hot water pump enable & status monitoring and control panel

1 – (Domestic Hot Water) Domestic hot water pump enable and hot water tank temperature sensor

- Note: Temperature sensor to be installed in existing well.

2 – (Locker Room Cabinet Heater) Unitary controllers, stainless steel zone temperature sensors and temperature control valves

2 – (Locker Room Exhaust Fan) Exhaust fans enable via Alerton BAS

CEC approved Economizer Fault Detection and Diagnostics (FDD) system for Alerton controlled economizers

Automated Demand Response (ADR) capabilities

Low voltage control transformers as required

All control wire and interlocks, at buildings, to be installed per state and local code

Site communication cable to be installed in existing underground conduits

Demo pneumatics to extent required for DDC replacement

Control system started and checked out for a complete and fully functional system

Includes performance verification of existing Alerton controlled chill water system and hot water system.

Engineering submittals, Programming, Graphics, As-Builts and O&M manuals

Walnut Grove Elementary School

Alerton global controller and temperature control panel

Software license capacity increase

Global outside air temperature sensor

9 – (Administration and Classrooms) Unitary controllers, combination zone temperature/humidity/CO2 sensors with LCD, supply air temperature sensors, fan status current switches, chill water temperature control valves and electric heat enables

2 – (Locker Rooms) Unitary controllers, stainless steel zone temperature sensors, supply air temperature sensors, fan status current switches, chill water temperature control valves and electric heat enables

1 – (Stage) Unitary controller, combination zone temperature/humidity/CO2 sensor with LCD, supply air temperature sensor, fan status current switch, chill water temperature control valve and electric heat enable

1 – (Gym) Unitary controller, combination zone temperature/humidity/CO2 sensor with LCD, supply air temperature sensor, fan status current switch, chill water temperature control valve, electric heat enable and economizer actuators

1 – (Chill Water System) – System controller, strap-on chill water supply & return water temperature sensors, chill water pump enable & status monitoring and control panel

CEC approved Economizer Fault Detection and Diagnostics (FDD) system for Alerton controlled economizers

- Automated Demand Response (ADR) capabilities
- Low voltage control transformers as required
- All control wire and interlocks, at buildings, to be installed per state and local code
- Demo pneumatics to extent required for DDC replacement
- Control system started and checked out for a complete and fully functional system
- Engineering submittals, Programming, Graphics, As-Builts and O&M manuals

Scope Specific Exclusions

- Balance of pneumatics to be abandoned in place; Demo of pneumatic tubing, components, compressor, etc is excluded
- Providing or installing any occupancy sensors or door switches
- Any mechanical system service or component replacement
- Providing, installing, monitoring or interlocking any smoke or carbon monoxide sensors (i.e. fire/smoke, unit duct, etc...)
- Any trenching, backfilling or underground conduit
- Any Ethernet network connections, Internet access or IT assistance
- Any air or water test and balancing
- Any asbestos or lead abatement**
- Any roof jacks, roof penetrations, access doors or associated work
- Any labor performed outside normal business hours.

ECM 4.01 – Replace HVAC Equipment

General Intent

The HVAC systems throughout the District are considerably outdated. With the existing equipment reaching the end of its useful life, maintaining it has become increasingly challenging, leading to a notable decline in energy efficiency. However, the situation is about to see a remarkable improvement. Plans are underway to replace these aging systems with state-of-the-art, high-efficiency units that comply with Title 24 requirements. This upgrade will revitalize the functionality and comfort of both facilities while contributing to a more sustainable and environmentally friendly approach that will benefit the entire community.

ECM Benefits

This measure aims to achieve a comprehensive maintenance cycle for the HVAC equipment, ensuring optimal performance and operational efficiency of the systems. By implementing this approach, we can enhance the overall functionality and guarantee consistent and reliable HVAC operation. The list of equipment below was compiled by analyzing the district needs assessment performed in 2019, consulting with RGMK on what has already been completed or approved, and inspecting the existing conditions at each site.

Impacted Equipment

Site Name	# of Units Affected
Bates Elementary	10
White Elementary	1
Delta High School	11
District Office	3
Walnut Grove Elementary	3
Rio Vista High School	20
Totals	48

See Attachment A – HVAC Equipment List for list of equipment to be replaced.

Mechanical

Remove and properly dispose of existing RTUs in accordance with all state and local codes.

Provide and install new heat pump RTUs with minimum Title 24 efficiency.

Reuse existing equipment sleepers. Provide and install new sleeper drip cap.

Include crane pick and rigging.

Reconnect new RTUs to existing thermostat controls.

Provide pre- and post-air balancing to match existing air flows.

Provide pre-measure total supply air and total outside air. Post installation, total supply air will be balanced to original air volume. Outside air will be set to match Title 24 requirements.

All new duct to be insulated in accordance with Title 24 requirements as required for mechanical electrical and structural permits.

Provide and install new electrical disconnects and fuses.

Provide necessary engineering and project management for a complete turnkey system.

Provide as-built drawings, cut sheets/submittal package, O&M manual.

Provide pre- and post-installation photos for documentation.

Provide training to District facilities staff.

ECM 4.01 – CalSHAPE Ventilation – Assessment and Maintenance (A&M), Filters, CO₂ Sensors, and Contingency Repair

Existing Conditions and General Intent

There are standalone thermostats throughout the district. This measure will install new network-capable electronic thermostats with integrated CO₂ sensors. These will immediately meet the requirements of the CalSHAPE program, making the district eligible for grant funding.

ECM Benefits

SES will add networked thermostats with integrated CO₂ sensors to meet the CalSHAPE requirements. Additionally, units will be tested following the Assessment and Maintenance (A&M) pathway for the CalSHAPE program, and a new round of filters will be installed. Finally, after the completion of (A&M), SES will provide a list of eligible repairs and perform repairs up to the allocated contingency budget at each school.

Detailed scope breakout per school

School Name	Assessment & Maintenance	Filter Replacements	CO₂ Provision & Installation	Contingency Repair \$
<i>Bates Elementary</i>	21	40	21	\$9,320
<i>Clarksburg Middle School</i>	26	60	26	\$11,220
<i>White Elementary</i>	30	60	30	\$10,498
<i>Delta High School</i>	28	60	28	\$11,860
<i>Isleton Elementary</i>	8	20	8	\$4,860
<i>District Office</i>				\$-
<i>Walnut Grove Elementary</i>	12	28	12	\$6,260
<i>Rio Vista High School</i>	40	80	40	\$13,999



<i>Riverview Middle School</i>	46	52	26	\$9,098
<i>River Delta Community Day</i>	5	10	5	\$1,747
<i>River Delta High/ES (alternative)</i>	30	60	30	\$10,500
<i>Mokelumne High Continuation</i>	4	12	4	\$3,459
Total	250	482	230	\$92,821

CalSHAPE Ventilation Assessment and Maintenance (A&M) Details:

1. Verification of HVAC quantities and types on site prior to starting work.
6. Verification of ventilation rates in eligible spaces will be performed by qualified testing personnel.
7. Calculation of the required minimum outside air ventilation rates for each occupied space.
8. Measurement of outside air under Section B of California Energy Commission (CEC) form CEC-NRCA-MCH-02-A.
9. Verification of survey readings of inlets and outlets to ensure all ventilation is reaching the served zone and there is adequate distribution.
10. Verification of building pressure relative to the outdoors to ensure a proper level of positive pressure differential.
11. Verification of coil velocities and discharge air temperatures required to maintain desired indoor conditions.
12. Confirmation that the air-handling units are bringing in outdoor air and removing exhaust air as intended by the system design.

HVAC Assessment Report

Provide and submit an HVAC Assessment report that has been prepared by Qualified Testing Personnel or Qualified Adjusting Personnel. HVAC assessment report to include:

1. Name and address of school facility and person preparing and certifying HVAC Assessment Report
13. Documentation of HVAC equipment model number, serial number, and general condition of unit
14. Verification that MERV 13 filters have been installed or that the maximum MERV-rated filter that the system is able to effectively handle has been installed.
15. Verification of ventilation rates for eligible spaces.
16. Documentation of system deficiencies and recommendations for additional maintenance, replacement, or upgrades to improve energy efficiency, safety, or performance.
17. Name of the utility that provides electricity service and monthly electricity meter data.

Filter Replacement

1. Verification of filter quantities and sizes on site prior to ordering.
2. Replacement of existing filters with a minimum efficiency of MERV 13 or better in the HVAC systems where feasible.
3. Recommendations for additional maintenance, replacement, or upgrades to the above will be recorded in the HVAC Assessment Report.

Pelican Thermostats with CO2 Sensor

1. Set in (230) Pelican™ thermostats with integrated CO2 sensors.
2. Install Pelican Gateways (1 per campus) for the campus at location determined by District Information Technology representative
3. Provide training and advisement to District Maintenance and Operations Staff regarding Operation / Programming and provide system manual documentation

CalSHAPE Contingency Repairs – requires approval by the District

1. The CalSHAPE program has an allowance for “minor repairs” following the assessment and maintenance of each HVAC unit, the allowed amount per school is detailed in Attachment A, which may be subject to change after the completion of the assessment tasks. Contingency dollars cannot be transferred between schools.
2. SES will compile a list of needed repairs and costs, broken out by school, to present to the district for approval.
3. SES strongly encourages the district to set aside additional contingency money to cover repairs that the CalSHAPE Contingency Repairs allowance does not cover.

5.0 – Lighting ECMs

ECM 5.01 – Lighting Efficiency and Lighting Controls Update

Existing Conditions and General Intent

The existing lighting systems in the District’s buildings are a mix of original linear T8 fluorescent tubes, recessed can lights with two (2) and three (3) lamp CFL (compact fluorescent lights) pin lamps and LED (light-emitting diode) lighting. This measure will replace the existing lighting systems identified in the lighting audit with new LED lamps or fixtures as recommended. Additional controls will be integrated where identified.

ECM Benefits

By replacing the existing lighting systems with LED lighting, a full round of maintenance and longer system life will be realized, reducing energy consumption, and increasing light production. In addition CA AB2208 will ban the sale of all screw in and bayonet-based fluorescent lamps Jan 1st 2024 and all linear pin-based lamps Jan 1st 2025. This project will eliminate any future concerns regarding the sourcing of lighting for the district.

Impacted Equipment

Please see “Attachment B – Lighting Line-by-Line” for details.

Building Lighting

1. Project line-by-line lighting audit
2. Disconnect and reconnect line voltage.
3. Coordinate working periods to minimize occupant impact.
4. Clean all work areas of debris and dust after lighting work is completed.
5. Dry wipe all new and remaining lighting surfaces, assuring they are free of dust and debris.
6. Dispose of removed lighting material in accordance with state and local environmental regulations.
7. Provide necessary engineering and project management to complete a turnkey system.
8. Provide as-built drawings, cut sheets/submittal package, and O&M manual.
9. Provide pre- and post-installation photos for documentation.
10. Provide training to District facilities staff.

ECM 5.03 – Sports Lighting & Lighting Controls Update

General Intent

The District currently maintains existing sports lighting at Rio Vista High School. This lighting system utilizes high-wattage metal halide lamps and ballasts that are operated by an antiquated control system. The intent of this measure is to completely demo all metal halide fixtures and cross arms/cages and replace them with new high efficiency LED (light-emitting diode) fixtures and cross arms.

The District has asked to review feasibility of installing new sports lighting for playing fields at Delta High School where the current lighting does not meet IES standards. This project will entail removal of all

existing poles and lighting at Delta High School as well as construction of new poles, cross-arms, and fixtures and will need to receive full Department of State Architect (DSA) submittal and approval. The two (2) sports field lighting sites will be equipped with the same design and controls as existing sports fields to ensure cohesion between sites for facilities staff.

ECM Benefits

By replacing the existing lighting systems with LED lighting, a full round of maintenance will be realized along with a longer lamp life with reduced energy consumption and increased light production. New sports lighting for the existing parks will provide additional security, allowing residents to use the parks after hours for community events.

Impacted Equipment

Lighting systems identified:

Delta High School

Rio Vista High School

See Attachment C for Sports Lighting Designs

Sports Lighting Retrofit (Rio Vista High School)

Factory built, wired, aimed, and tested lighting system includes:

- Factory wired crossarm assemblies
- Remote electrical component enclosures
- Pole-length wire harnesses
- Factory aimed and assembled luminaires including BallTracker™ technology.
- UL listed as a complete system; disconnect and reconnect to existing line voltage

Light levels are designed to provide fifty (50) footcandles in the infield and thirty (30) footcandles in the outfield.

BallTracker™ technology provides targeted aerial light optimizing visibility of the ball in play with no glare for players.

Design summary:

- The lighting design for all fields at both parks is meeting 'Little League' light levels of fifty (50) footcandle average in the infield (2:1 uniformity), and thirty (30) footcandle average in the outfield (2.5:1 uniformity).

Product assurance and warranty program include materials and onsite labor, eliminating 100% of your maintenance costs for ten (10) years.

Control-Link® control and monitoring system provides remote on/off, dimming (high/medium/low) control, and performance monitoring with 24/7 customer support.

New Sports Lighting (Delta High School)

Factory built, wired, aimed and tested lighting system includes:

- Pre-cast concrete bases
- Galvanized steel poles
- Factory-wired and tested remote electrical component enclosures.
- Pole length factory-assembled wire harnesses
- Factory-aimed and assembled luminaires, including BallTracker® technology.
- UL listed as a complete system
- Enhanced corrosion protection

Light levels are designed to provide fifty (50) footcandles in the infield and 30 footcandles in the outfield.

BallTracker™ technology – targeted aerial light optimizing visibility of the ball in play with no glare for players.

Design Summary:

- The lighting design for all fields at both parks is meeting 'Little League' light levels of fifty (50) footcandle average in the infield (2:1 uniformity), and thirty (30) footcandle average in the outfield (2.5:1 uniformity).

Product assurance and warranty program that includes materials and onsite labor, eliminating 100% of your maintenance costs for twenty-five (25) years.

Control-Link® control and monitoring system to provide remote on/off, dimming (high/medium/low) control, and performance monitoring with 24/7 customer support.

Division of the State Architect (DSA) submittal.

6.0 – Building Envelope ECMs

ECM 6.01 – Building Envelope Sealing

General Intent

The exterior doors and exit stairwell doors have missing or damaged door sweeps and seals. This allows for air, water, and pest infiltration of the buildings. This infiltration can be reduced by repairing or replacing the door sweeps and seals of the exterior doors. Installing door sweeps on the interior exit doors will more adequately maintain occupied spaces. By properly insulating and sealing wall penetrations from pipes or other utilities, infiltration will also be reduced.

ECM Benefits

Reduced infiltration and conditioned air migration will reduce the amount of energy needed to maintain occupied spaces.

Impacted Equipment

See Attachment D for Building Envelope Summary

Envelope

Provide and install appropriate door sweeps and seals for all exterior exit doors.

Provide and install appropriate wall insulation sealant.

Provide necessary engineering and project management for a complete turnkey system.

Provide as-built drawings, cut sheets/submittal package, O&M manual.

Provide pre- and post-installation photos for documentation.

Provide training to District facilities staff.

11.0 – Renewable Energy Systems

ECM 11.01 – Solar Photovoltaic Systems

General Intent

The design of the new solar arrays was developed with an energy efficiency project to offset a significant portion of the District's electricity use and costs from local electric utilities (PG&E AND SMUD). Equipment location, identification, and selection is the result of our detailed review of the site, the District's building plans, specifications, physical equipment arrangements, and discussions with District staff. These new solar photovoltaic (PV) arrays are intended to reduce the annual true-up energy and cost consumption relative to the PG&E AND SMUD bills. The following is the detailed description of the intent, benefits, impacted equipment, design method, and construction methods.

This project will design, furnish, and install new solar PV carport structures over existing parking stalls and blacktop areas. These new systems, coupled with the energy efficiency measures which will be concurrently constructed, are intended to reduce the annual true-up energy consumption and cost relative to the electrical bills.

ECM Benefits

The District stands to gain significant benefits from this initiative, primarily by reducing its reliance on purchased electrical energy from the grid. Through the implementation of additional solar production onsite, the District will offset a substantial amount of electricity, resulting in a remarkable reduction in ongoing operational costs. Furthermore, this strategic move will secure the District with favorable Net Metering 2.0 solar electrical rates, which expired in April 2023. By taking advantage of these legacy rates, the District can foster long-term savings and promote a sustainable approach to its energy consumption, positively impacting both its financial bottom line and environmental footprint. The District will achieve the future goals in the Master Plan as well as provide shaded parking at numerous sites.

Impacted Sites

Site	Targeted PV Production (kWh)	Full Depth Casings Included?
Delta High School - Main Meter	410,572	Yes
Bates Elementary School	200,792	Yes
Walnut Grove Elementary School	204,855	Yes
Isleton Elementary School	111,575	Yes
DH White Elementary School	254,933	No
Rio Vista High School	358,034	No
River View Middle School	107,511	No

Solar PV Designs Delta High School



Bates Elementary School



Walnut Grove Elementary School



Isleton Elementary School



DH White Elementary School



Rio Vista High School



DRAFT

Riverview Middle School



DR

Assumed Conditions

11. All work is to be performed during regular work hours (Monday through Friday, 7:00 a.m. – 5:00 p.m.)
12. All field craft labor will comply with prevailing wage requirements and current California Department of Industrial Relations (DIR).
13. The District shall provide all IT support required for the installation of solar PV software or interface system for this project.
14. All structural engineering related to the support of equipment as identified in this proposal is included. All structural work related to the construction of the canopy structures is included. All other structural work and/or upgrades are excluded.
15. The District will provide a laydown and storage area during the construction period.
16. All permit drawings required for the execution of the work are included.
17. The District will provide electrical power to operate electrical construction tools and equipment.
18. Pricing is based on a single-phase project. Multiple phases or extensions to the schedule may constitute a change in the scope of work and the project schedule.
19. Warranty from the date of Notice of Substantial Completion is included.
20. All carport solar PV structures shall include LED lighting, as required by code.
21. Carport Solar PV structural pier depths assumed at 12-foot per DSA pre-check design.
22. Full depth casings for structural columns included assuming existing ground water at following sites:
 - a. Delta High School
 - b. Bates Elementary School
 - c. Walnut Grove Elementary School
 - d. Isleton Elementary School

Design Phase

23. The solar PV schematic design aims to meet the targeted electrical production outlined in the conceptual design, which is provided in the technical documents for each site. It will be based on an accurate and detailed modeling of system production, consideration of shading analysis, and other site constraints using industry-standard tools. The design plans will include sufficient detail to analyze and discuss critical design decisions and the system size will be within the allowed footprint (or as agreed upon).
24. Design development and complete construction drawings of the solar PV and all ancillary work required for permitting and construction. Drawings shall fully describe all aspects of the construction work including fencing, directional boring/trenching, excavations, racking and mounting systems, electrical systems, signage, foundations, lighting, Americans with Disabilities Act (ADA), etc. We will provide electrical, structural, and all other required California licensed engineers and/or architects (Engineers of Record and Architect of Record) to provide a complete, stamped design set as required to permit and construct a complete energy project for the authority having jurisdiction (AHJ) submittal. The electrical construction drawings shall show and include all conduit below and above finished grade/finish. All plans and specifications must meet the approval of AHJ, the District, the

District's representative, local fire authority, and/or any other agency deemed as having jurisdiction over this project.

25. All design and engineering will follow the approved submittal process.

Construction Phase

1. Provision and Installation of the following:
 - a. PV racking
 - b. PV modules
 - c. PV inverters
 - d. Attachments/foundations
 - e. Data collection and online monitoring system with a five (5) year monitoring service subscription, five (5) years cellular service plan, and weather inputs such as irradiance, panel temperature, ambient temperature, and utility grade production reporting.
 - f. Interconnection work includes connection of the renewable energy system to the existing Main Switch Board (MSB). MSB is assumed to be suitable for the new energy system connection.
2. SES will provide the utility Interconnection Application (IA), process management, materials, and coordination for inspection from the local utility. The IA process includes a utility application review phase. The utility engineering review phase can result in additional costs not included or reasonably anticipated (as they can only be determined by the utility at the end of the IA process) upon execution of the contract.
3. SES will identify all ADA compliance issues that are directly associated with this project. SES is responsible for covered parking space ratios, signage, and any other compliance issues that are located under the footprint of any PV array canopy including canopies not located in parking lots. The cost of all other ADA compliance improvements outside of canopy areas (i.e., path-of-travel access issues that fall outside of the canopy footprint) is not known at this time and is therefore excluded from this scope of work but could be added as a change order at a later date.
4. SES' project manager will be assigned for the duration of the project through final completion and will facilitate regular coordination meetings (via conference calls or onsite visits, if necessary).

The assigned project manager will create project schedule with a District representative utilizing project constraints and information revealed during due diligence activities within the design and engineering phase.

The project schedule will include the following phases sequentially:

- a. Design, engineering phase
 - b. Permitting phase
 - c. Procurement phase
 - d. Construction phase
 - e. Commissioning phase
 - f. Close-out phase
5. SES will provide weekly reports for all work performed when onsite.

6. SES will coordinate with and support inspectors, the District, our team, and consultants during design, construction, commissioning, and close-out.
7. All work assumes normal subsurface and digging conditions.
 - a. SES anticipates ground water to affect structural pier foundations and have included full depth (12-foot) casings at the following sites:
 - i. Delta High School
 - ii. Bates Elementary School
 - iii. Walnut Grove Elementary School
 - iv. Isleton Elementary School
8. The District acknowledges that our team has not yet performed subsurface due diligence or a geotechnical engineering analysis and therefore make no representation of knowing the impact of the results of the geotechnical study upon the scope, cost, or schedule of the proposed project.
9. Any demo of existing softscape, hardscape, light standards that are required as a result of the installation of the energy projects will be the sole responsibility of our team.
10. SES will perform project commissioning including all associated tasks and documentation.
11. Final energy system as-built construction documents clearly conformed with all changes during construction shall be provided.
12. SES will provide a comprehensive set of closeout documents, including O&M manuals for each installed system.
13. SES will conduct training for District staff including orientation to the O&M manuals, systems, and safety procedures.
14. SES will secure laydown and storage facility at job site for all canopy materials and energy system equipment, and supplies including any required security.
15. SES will provide a legal toilet and handwashing facilities at all job sites.
16. SES will perform daily cleanup to "broom clean" conditions.
17. SES will return disturbed areas to pre-construction conditions including repair of all pavement/concrete, street sweeping, restriping, landscape restoration, irrigation restoration, equipment track marks, and scuffs on finished concrete surfaces.
18. SES will provide project closeout, inclusive of obtaining AHJ final inspection and closeout.
19. SES will provide a Stormwater Pollution Prevention Plan (SWPPP)

District Furnished/Performed Items

1. Any and all as built drawings or site-specific information necessary to effectively design, engineer and construct the renewable energy solution including but not limited to past site plans, underground private utilities, including irrigation infrastructure, permits for past work, etc.
2. Utility lines located / line location prior to construction.
3. Water as needed to complete the work. Construction services and, if it is required by the authority having jurisdiction, to fill any fire safety water tanks.

4. Provide and maintain a suitable good-weather Site access road that will accommodate heavy vehicles, deliveries, and service vehicles.
5. Site preparation including but not limited to vegetation removal, adequate grading, and soil compaction to SES Renewable energy solution specifications.
6. Provide a mutually acceptable construction staging and storage area(s) adjacent to project Site throughout the construction phase.
7. Unrestricted access to the Site during construction Monday through Friday, 6:00 a.m. – 6:00 p.m.
8. Lab of Record (LOR), Inspector of Record (IOR), and special inspections.

Exclusions

1. All ADA upgrades are excluded unless specifically included in the scope of work.
2. Any upgrades determined after due diligence after Contract Effective Date by the AOR will be managed through a contract change order.
3. Engineering, installation, and maintenance of permanent stormwater facilities and features if required by the AHJ, which includes the best management practice mitigations including but not limited to riprap, basins, inlet structures down inlet protections.
4. Multiple mobilizations.
5. Environmental engineering and/or any environmental/biological remediation.
6. Floodplain engineering and/or any alterations to site and materials to accommodate floodplains unless specifically included.
7. Service upgrades, electrical service equipment, or new services.
8. Changes to project design and implementation required to accommodate easements and/or rights of way not listed in the scope of work.
9. Environmental assessment, environmental impact reports, testing, and other reports not listed in the scope of work.
10. Any design or engineering related to flood plans and/or FEMA high-hazard floodplains.
11. All work associated with SWPPPs and Site stabilization.
12. Specialized environmental insurance.
13. Relocation and/or removal of any existing utilities (active or abandoned), inclusive of water, electricity, communication, data, cable TV, security systems, irrigation, etc.
14. Hazardous material surveys, testing, and/or monitoring.
15. Removal and/or disposal of any hazardous or contaminated materials.
16. Rock excavation and drilling.
17. Soft soil stabilization.
18. Dewatering drilled foundations and sleeving of foundations are excluded unless specifically included.
19. Removal/disposal of existing on-site trash and/or debris (inclusive of encountered underground trash or debris).
20. Corrosion-resistant materials (beyond standard galvanization).
21. Arc Fault Hazard Assessment.

- 22. Overcurrent protection coordination studies
- 23. Lab of Record (LOR), Inspector of Record (IOR), and special inspections.

Solar PV Software Interface

The system will provide data on the generation of the solar PV system. Local environmental conditions will be measured. The new monitoring system will be able to determine the total expected production of the solar PV system using the measured environmental conditions and the configuration of the as-built system. It will provide insight into the system’s health by measuring the actual production compared to the expected production.

12.0 – Electrical ECMs

ECM 12.01 – Power Transformer Replacement

Existing Conditions and General Intent

The existing power transformers located throughout District are dated and are simply not energy efficient. By replacing these with new high-efficiency transformers, the standby and low-load losses incurred by the transformers will be significantly reduced. Excess heat generated by the inefficient conversion of power will also be reduced, decreasing cooling demand.

ECM Benefits

By replacing the existing transformers, a full round of maintenance will be carried out on the equipment and the power in the building will be converted more efficiently, thereby reducing demand and energy load on the building.

Impacted Equipment

Site Name	Quantity of Transformers
Delta High School.	8
Rio Vista High School	3
DH White Elementary School	4
Total	15

Site Name	Baseline kVA	Quantity
Delta High School	75	3
Delta High School	112.5	4
Delta High School	150	1
Rio Vista High School	112.5	1
Rio Vista High School	150	1
Rio Vista High School	500	1
DH White Elementary School	45	1
DH White Elementary School	75	1
DH White Elementary School	150	1
DH White Elementary School.	225	1

Electrical

De-energize system and lock-out/tag-out

Disconnect and properly dispose of existing transformers.

Provide new transformers as per audit

Install new transformers

Include structural analysis as required

Confirm installation per manufacturer's specification.

Re-energize system and remove lock-out/tag-out.

Provide necessary engineering and project management to complete a turnkey system.

Provide as-built drawings, cut sheets/submittal package, and O&M manual.

Provide pre- and post-installation photos for documentation.

Provide training to District facilities staff.

Exclusions:

- Seismic calculations, floor plans, structural or electrical engineering or fees. This is a "like-for-like" replacement not requiring these services.
- Permits, plan check or Division of the State Architect (DSA) submittals. This is a "like-for-like" replacement not requiring plan checks or permits.
- New or additions to concrete pads or demo of any pads. The existing pads are assumed to be sufficient and will be re-used.
- Painting of conduits
- Emergency or temporary power during power outages or cut overs.
- Removal or cleaning of existing equipment or debris from work areas (electric rooms).
- Verification of loads served from each transformer.
- Verification that individual loads are energized after new transformers are installed (facilities to verify)
- Any sound, vibration, or ground tests
- Any pre or post transformer tests besides voltage and rotation tests.
- New grounding electrode or grounding electrode conductors. Existing grounding will be used.

Clarifications:

- Pricing reflects new transformers being installed in same locations as existing.
- Work may be performed during normal working hours, except where noted.
- Power will be shut down to the entire campus. The District is responsible for proper shutdown of any IT, refrigeration, fire/life/safety, security and alarms, or other equipment that may be affected by a power outage.

Water and Sewer Conservation ECMs

ECM 13.1 – Low Flow Water Fixtures

General Intent

There are inefficient plumbing fixtures that utilize domestic hot water at select District campuses. This ECM will replace all CalSHAPE eligible fixtures that yield therm savings with CalSHAPE compliant low flow fixtures.

ECM Benefits

By replacing this equipment, the District is utilizing CalSHAPE grant funding to upgrade all eligible fixtures to low flow, which will realize water and sewer savings across the District.

Impacted Equipment

Please see "Attachment E – Plumbing Scope" for details.

Plug Load ECMs

ECM 19.1 – Plug Load Controllers

General Intent

There are many devices that are plugged into wall outlets for power. This includes copiers, printers, projectors, TVs, portable air filters, water heaters/coolers, coffee machines, refrigerators, charging carts, etc. throughout the District. This equipment consumes electricity when not in use. When taken in aggregate the volume of stand-by electricity consumption adds notable and unnecessary cost. This measure will install plug load, end-device controllers, and centralized infrastructure to schedule, monitor, and control these devices for the purpose of reducing stand-by energy losses.

ECM Benefits

By turning this equipment completely off on a schedule the District can be sure that plugged in equipment is fully turned off each night, eliminating energy waste.

Impacted Equipment

Site Name	# of plug load controllers
Delta High School	37
Clarksburg Middle School	15
Bates Elementary School	24
Walnut Grove Elementary School	39
Isleton Elementary School	36
DH White Elementary School	50
District Office	8
Rio Vista High School	43
River View Middle School	37

Total	289
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Plug Load Scope of Work Details

1. Provide and install virtual machine software to control the end devices. Each plug load controller will require an IP address.
2. Pre-install wireless network credentials and password to all new equipment
3. Provide and install plug load end devices as per the line-by-line audit.
4. Provide necessary engineering and project management for complete turnkey system.
5. Provide cut sheets/submittal package and O&M manual.
6. Provide owner/operator training.

DRAFT

Section 3 – Project Financials

3.1 Firm-Fixed Project Cost

Costs presented in this proposal are valid until December 31, 2023. If the Notice to Proceed is issued after December 31, 2023, we reserve the right to re-evaluate the project and make necessary modifications to the construction cost.

SES will provide a *Schedule of Values* that will include all costs related to the installation of the equipment. The *Schedule of Values* will be presented during the project construction kickoff meeting at the initiation of the project implementation phase.

Mobilization, project development, and engineering fee:

- The invoice will be presented upon mutual execution of the Energy Services Agreement and will be in the amount of 25% of the project's total value.

DRAFT

Attachment A – HVAC Equipment List

DRAFT

Attachment B – Lighting Line by Line

DRAFT

Attachment C – Sports Lighting Design

DRAFT

Attachment D – Building Envelope summary

DRAFT

Attachment E – Plumbing Scope

DRAFT

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: 1

From: Tammy Busch, Asst. Superintendent of Business Service

Item Number: 18.

Type of item: (Action, Consent Action or Information Only): Action

SUBJECT: Request to Approve the Fee Proposal from RGM Kramer to provide Construction Management Services for Measure J and K Facilities Bond Projects as outlined below.

BACKGROUND: As requested by the District, RGM Kramer has provided a proposal to provide Construction Management services on several projects:

- Rio Vista High School Woodshop (Measure J)
- Fencing at Rio Vista High, Isleton and Bates Elementary Schools (Measures J & K)
- Systems Assessment (fire alarm, internet, data, clock/speaker/PA) (Measures J & K)
- Delta High School Septic Replacement (Measure K)
- Delta High School Gym Boiler Replacement (Measure K)

STATUS:

Staff recommends authorization of RGM Kramer to provide Construction Management Services for the Measure J and K Facilities Bond Projects.

PRESENTER: Tammy Busch, Asst. Superintendent of Business Service and Katherine Wright, Superintendent

OTHER PEOPLE WHO MIGHT BE PRESENT:

Maria Denney and Ralph Caputo, RGM Kramer

COST AND FUNDING SOURCES:

Measure K (24%) not to exceed \$49,166. Measure J (76%) not to exceed \$155,692.

Total contract amount is \$204,858.

RECOMMENDATION: Staff recommends:

(1) the Board approve the RGMK construction management proposal.

Time allocated: 2 minutes

November 30, 2023

Ms. Tammy Busch, Chief Business Official
River Delta Unified School District
445 Montezuma Street
Rio Vista, CA 94571

Re: Measure J and K Bond Programs
Construction Management
Fee Proposal

Dear Ms. Busch:

In accordance with the Agreement between the District and RGM Kramer, Inc., the following is our fee proposal for Construction Management services for the Miscellaneous Additional Bond Projects as outlined in the attachment.

As set forth in the Agreement, our fee will be on an a not-to-exceed time and material basis based on the approved hourly rate. Our estimated cost for services for these projects shall not exceed \$204,858.

The services to be provided shall be as described in the Agreement for the projects described below.

- RVHS Woodshop, skylight repair, electrical repairs, and dust collection system repair/ replacement Projects
- Fencing at Bates, RVHS and Isleton Projects
- Systems Assessments – District wide. Planning and budget development for projects.
- DHS Septic Replacement Project
- DHS Gym Boiler Project

If satisfactory, please sign and return one copy for our records.

Respectfully Submitted,



Ralph J. Caputo, CEO
RGM Kramer, Inc.

CC:

Kathy Wright, RDUSD
Rich Dunlap, RGM Kramer, Inc.
Maria Denney, RGM Kramer, Inc.

Corporate Office • 3230 Monument Way • Concord, CA 94518 • Phone: (925) 671-7717
4020 Moorpark Avenue, Suite 220 • San Jose, CA 95117 • Phone: (408) 246-6327
1101 College Avenue, Suite 215 • Santa Rosa, CA 95404 • Phone: (707) 575-9550

RVHS Woodshop

	Pre-Bid	Bid	Construction	Closeout	Total Hours	Hourly Rates	Total Amount
Sr. Program Director	-	-	-	-	-	\$ 203.00	\$ -
Program Manager	-	-	-	-	-	\$ 198.00	\$ -
Project Manager	-	-	80.00	-	80.00	\$ 192.00	\$ 15,360.00
Project Engineer	-	-	80.00	-	80.00	\$ 148.00	\$ 11,840.00
Admin Assistant	-	-	20.00	20.00	40.00	\$ 99.00	\$ 3,960.00
Subtotal							\$ 31,160.00
Grand Total							\$ 31,160.00

Fencing at Bates, RVHS & Isleton

	Pre-Bid	Bid	Construction	Closeout	Total Hours	Hourly Rates	Total Amount
Sr. Program Director	-	-	-	-	-	\$ 203.00	\$ -
Program Manager	4.00	4.00	-	-	8.00	\$ 198.00	\$ 1,584.00
Project Manager	40.00	40.00	80.00	-	160.00	\$ 192.00	\$ 30,720.00
Project Engineer	20.00	20.00	80.00	-	120.00	\$ 148.00	\$ 17,760.00
Admin Assistant	60.00	40.00	20.00	20.00	140.00	\$ 99.00	\$ 13,860.00
Subtotal							\$ 63,924.00
Grand Total							\$ 63,924.00

Systems Assessments - District wide

	Planning	Bid	Construction	Closeout	Total Hours	Hourly Rates	Total Amount
Sr. Program Director	10.00	-	-	-	10.00	\$ 203.00	\$ 2,030.00
Program Manager	10.00	-	-	-	10.00	\$ 198.00	\$ 1,980.00
Project Manager	40.00	-	-	-	40.00	\$ 192.00	\$ 7,680.00
Project Engineer	40.00	-	-	-	40.00	\$ 148.00	\$ 5,920.00
Admin Assistant	40.00	-	-	-	40.00	\$ 99.00	\$ 3,960.00
Subtotal							\$ 21,570.00
Grand Total							\$ 21,570.00

DHS Septic Replacement

	Pre-Bid	Bid	Construction	Closeout	Total Hours	Hourly Rates	Total Amount
Sr. Program Director	-	-	-	-	-	\$ 203.00	\$ -
Program Manager	-	-	-	-	-	\$ 198.00	\$ -
Project Manager	-	-	80.00	-	80.00	\$ 192.00	\$ 15,360.00
Project Engineer	-	-	20.00	-	20.00	\$ 148.00	\$ 2,960.00
Admin Assistant	-	-	20.00	20.00	40.00	\$ 99.00	\$ 3,960.00
Subtotal							\$ 22,280.00
Grand Total							\$ 22,280.00

DHS Gym Boiler

	Pre-Bid	Bid	Construction	Closeout	Total Hours	Hourly Rates	Total Amount
Sr. Program Director	4.00	-	-	-	4.00	\$ 203.00	\$ 812.00
Program Manager	4.00	-	-	-	4.00	\$ 198.00	\$ 792.00
Project Manager	40.00	20.00	80.00	20.00	160.00	\$ 192.00	\$ 30,720.00
Project Engineer	20.00	20.00	80.00	-	120.00	\$ 148.00	\$ 17,760.00
Admin Assistant	60.00	40.00	20.00	40.00	160.00	\$ 99.00	\$ 15,840.00
Subtotal							\$ 65,924.00
Grand Total							\$ 65,924.00

\$ 204,858.00

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: 1

From: Tammy Busch, Asst. Superintendent of Business Services

Item Number: 19

Type of item: (Action, Consent Action or Information Only): Action

SUBJECT:

Request to Approve the Fee Proposal from RGM Kramer to Provide Construction Management Services for the District Office Repair Project.

BACKGROUND:

As requested by the District, RGM Kramer has provided a proposal to provide Construction Management services at the District Office to repair stairs, replace windows, replace ceiling tiles and painting. This work will be performed on an hourly basis with a not to exceed amount.

STATUS:

Staff recommends authorization of RGM Kramer to provide Construction Management Services for District Office Repairs Project.

PRESENTER:

Tammy Busch, Asst. Superintendent of Business Services and Katherine Wright,
Superintendent

OTHER PEOPLE WHO MIGHT BE PRESENT:

Maria Denney and Ralph Caputo, RGM Kramer

COST AND FUNDING SOURCES:

\$25,240 - Deferred Maintenance Funds

RECOMMENDATION: Staff recommends:

(1) the Board approves the RGMK construction management proposal.

Time allocated: 2 minutes

November 30, 2023

Ms. Tammy Busch, Chief Business Official
River Delta Unified School District
445 Montezuma Street
Rio Vista, CA 94571

Re: District Office Repairs
Construction Management
Fee Proposal

Dear Ms. Busch:

In accordance with the Agreement between the District and RGM Kramer, Inc., the following is our fee proposal for Construction Management services for the District Office Repairs Projects as outlined in the attachment.

As set forth in the Agreement, our fee will be on a not-to-exceed time and materials basis based on the approved hourly rate. Our estimated cost for services for these projects shall not exceed \$25,240.

The services to be provided shall be as described in the Agreement.

If satisfactory, please issue a Purchase Order with this proposal.

Respectfully Submitted,



Ralph J. Caputo, CEO
RGM Kramer, Inc.

CC:

Kathy Wright, RDUSD
Rich Dunlap, RGM Kramer, Inc.
Maria Denney, RGM Kramer, Inc.
Starbrina Times, RGM Kramer, Inc.

**River Delta Unified School District
Facilities Management
Fee Calculation
11/30/2023**

District Office Repairs

	Pre-Bid	Bid	Construction	Closeout	Total Hours	Hourly Rates	Total Amount
Sr. Program Director	-	-	-	-	-	\$ 203.00	\$ -
Program Manager			-		-	\$ 198.00	\$ -
Project Manager			80.00		80.00	\$ 192.00	\$ 15,360.00
Project Engineer	-	-	40.00		40.00	\$ 148.00	\$ 5,920.00
Admin Assistant	-	-	20.00	20.00	40.00	\$ 99.00	\$ 3,960.00
						Subtotal	\$ 25,240.00
						Grand Total	\$ 25,240.00

BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: 2

From: Tammy Busch, Asst. Superintendent of Business Service

Item Number: 20

Type of item: (Action, Consent Action or Information Only): Action

SUBJECT: Request to Award the Contract to Hometown Construction for the HVAC Projects at Clarksburg Middle School, Isleton Elementary School, Rio Vista High School; and to Authorize the Superintendent or Designee to Award the Contract for D.H. White Elementary School

BACKGROUND: In 2022, Capital Engineering in cooperation with Camacho Mechanical and District Maintenance staff completed an assessment of the District's HVAC systems at all sites. District maintenance staff subsequently identified priority projects at each site. RGM Kramer prepared budget estimates for the priority work and the replacement of selected items at four sites (Isleton ES, D.H. White ES, Rio Vista HS and Clarksburg MS) was selected by District staff as the recommended initial projects.

STATUS: An advertisement requesting bids was placed in the Sacramento Bee on November 10 & 17, 2023, and plans were posted in multiple plan rooms. A pre-bid conference and site walk occurred on November 20, 2023 where eight (8) contractors attended. Bids were opened on December 5, 2023, four (4) bids were received. The apparent low bid was submitted by Hometown Construction for Isleton, B&M Builders for DH White, Hometown Construction for RVHS and Hometown Construction for Clarksburg. Award is based on the lowest base bid. An alternate to clean the existing HVAC ducts was included in the bid as recommended by the mechanical engineer. The lowest bid provided for DH White is currently being vetted by RGM Kramer; this bid is significantly lower than budgeted.

RGM Kramer has also updated the attached Master Budget for the project incorporating the actual bid amount and other actual contract amounts. The project is within budget.

PRESENTER: Tammy Busch, Asst. Superintendent of Business Service and Katherine Wright, Superintendent

OTHER PEOPLE WHO MIGHT BE PRESENT: Maria Denney and Ralph Caputo, RGM Kramer

COST AND FUNDING SOURCES: ESSER not to exceed \$884,252.

RECOMMENDATION: Staff recommends:

1. The Board approve the bid award to Hometown Construction in the amount of \$110,300 for Isleton.
2. The Board approve the bid award to Hometown Construction in the amount of \$109,800 for RVHS.
3. The Board approve the bid award to Hometown Construction in the amount of \$212,152 for Clarksburg.
4. The Superintendent or designee be authorized to award the DH White HVAC project up to an amount of \$452,000.

Time allocated: 4 minutes

River Delta Unified School District
HVAC Replacement at Four Sites

Description: HVAC Replacement
Buildings: NA
Square Feet: NA

MASTER BUDGET SUMMARY
December 5, 2023

Preliminary
X Bid Day Costs
Final



Description	Isleton Budget 3/24/2023	Isleton Bid Day 12/5/2023	D. H.White Budget 3/24/2023	D. H.White Bid Day 12/5/2023	Rio Vista HS Budget 3/24/2023	Rio Vista HS Bid Day 12/5/2023	Clarksburg MS Budget 3/24/2023	Clarksburg MS Bid Day 12/5/2023	Total Budget 3/24/2023	Total Bid Day 12/5/2023	Comments
A. SITE											
1 SITE ACQUISITION/APPRaisal/TITLE											
2 SURVEY											
3 SITE SUPPORT - BOND FEES											
4 LEGAL FEES - Allowances	\$ 1,500	\$ -	\$ 1,500	\$ -	\$ 1,500	\$ -	\$ 1,500	\$ -	\$ 6,000	\$ -	Allowance
5 OTHER (EIR/Negative Declaration)											
6 OTHER											
SITE SUBTOTAL	\$ 1,500	\$ -	\$ 1,500	\$ -	\$ 1,500	\$ -	\$ 1,500	\$ -	\$ 6,000	\$ -	
B. PLANS											
1 ARCHITECT'S FEE FOR PLANS	\$ 15,870	\$ 15,870	\$ 68,615	\$ 68,615	\$ 18,280	\$ 18,280	\$ 24,900	\$ 24,900	\$ 127,665	\$ 127,665	Per proposal from Capital Engr.
2 DSA FEES											
DSA HOURLY FEES ALLOWANCE											
4 HEALTH DEPARTMENT											
5 ENERGY ANALYSIS FEES											
6 DEPARTMENT OF EDUCATION - PLAN CHECK FEE											
7 PRELIMINARY TESTS											
A. SOILS											
B. OPSC & YRE CONSULTANTS											
C. BIDDING AND ADVERTISING	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 6,000	\$ 6,000	Allowance
D. ENGINEERING/CONSULTING											
E. HAZARDOUS MATERIAL SURVEY/SPECS											
8 ADMINISTRATIVE COSTS											
PLANS SUBTOTAL	\$ 17,370	\$ 17,370	\$ 70,115	\$ 70,115	\$ 19,780	\$ 19,780	\$ 26,400	\$ 26,400	\$ 133,665	\$ 133,665	
C. CONSTRUCTION											
1 A. UTILITY SERVICE FEES											
B. UTILITY SERVICE IMPROVEMENTS											
2 OFF-SITE DEVELOPMENT											
3 SERVICE SITE DEVELOPMENT											
4 GENERAL SERVICE SITE DEVELOPMENT											
5 MODERNIZATION	\$ 100,500	\$ 110,300	\$ 670,000	\$ 452,000	\$ 100,500	\$ 109,800	\$ 258,000	\$ 212,152	\$ 1,129,000	\$ 884,252	Bid Day Costs
6 DEMOLITION / INTERIM HOUSING*											
7 NEW CONSTRUCTION											
8 A. UNCONVENTIONAL ENERGY SOURCES											
B. SPECIAL ACCESS COMPLIANCE											
C. TECHNOLOGY ALLOWANCE											
9 ENVIRONMENTAL ABATEMENT											
10 AIR MONITOR CLEARANCE											
11 PROJECT MANAGEMENT	\$ 8,040	\$ 8,040	\$ 52,750	\$ 52,750	\$ 8,040	\$ 8,040	\$ 20,640	\$ 20,640	\$ 89,470	\$ 89,470	Per RGMK proposal
AFTER HOURS SUPERVISION ALLOWANCE											
12 OTHER (ITEMIZE)											
A. Labor Compliance											
B. MOVING/STORAGE (District Expense)											
C. UNDERGROUND UTILITY SEARCH											
CONSTRUCTION SUBTOTAL	\$ 108,540	\$ 118,340	\$ 722,750	\$ 504,750	\$ 108,540	\$ 117,840	\$ 278,640	\$ 232,792	\$ 1,218,470	\$ 973,722	
D. TESTS (CONSTRUCTION LAB)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
E. INSPECTION (IOR)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
F. FURNITURE AND EQUIPMENT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
G. CONTINGENCIES	\$ 20,100	\$ 134,000	\$ 134,000	\$ 20,100	\$ 20,100	\$ 51,600	\$ -	\$ -	\$ 225,800	\$ -	
TOTAL ESTIMATED COSTS (ITEMS A THROUGH G)	\$ 147,510	\$ 928,365	\$ 149,920	\$ 358,140	\$ 1,583,935	\$ -	\$ -	\$ -	\$ -	\$ -	

River Delta Unified School District- HVAC Replacement at Various Sites

CLARKSBURG MIDDLE SCHOOL- Budget \$258,000

Bidders:	<u>Pro- Ex Construction</u>	<u>Diede Construction</u>	<u>B&M Builders</u>	<u>Hometown Construction</u>
Total Bid	\$ 253,000.00	\$ 168,158.00	\$ 197,264.00	\$ 165,152.00
Allowance	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00
Base Bid	\$ 278,000.00	\$ 193,158.00	\$ 222,264.00	\$ 190,152.00
Alternate #1	\$ 47,000.00	\$ 4,900.00	\$ 6,200.00	\$ 22,000.00
Base Bid Incl. Alt #1	\$ 325,000.00	\$ 198,058.00	\$ 228,464.00	\$ 212,152.00

Budget \$ 1,129,000.00

ISLETON ELEMENTARY SCHOOL- Budget \$100,500

Bidders:	<u>Pro- Ex Construction</u>	<u>Diede Construction</u>	<u>B&M Builders</u>	<u>Hometown Construction</u>
Total Bid	\$ 146,000.00	\$ 96,488.00	\$ 80,061.00	\$ 77,900.00
Allowance	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00
Base Bid	\$ 171,000.00	\$ 121,488.00	\$ 105,061.00	\$ 102,900.00
Alternate #1	\$ 23,000.00	\$ 2,100.00	\$ 3,800.00	\$ 7,400.00
Base Bid Incl. Alt #1	\$ 194,000.00	\$ 123,588.00	\$ 108,861.00	\$ 110,300.00

Base Bid \$ 705,512.00

Award w/ Alternate \$ 744,812.00

DH WHITE ELEMENTARY SCHOOL= Budget \$670,000

Bidders:	<u>Pro- Ex Construction</u>	<u>Diede Construction</u>	<u>B&M Builders</u>	<u>Hometown Construction</u>
Total Bid	\$ 524,000.00	\$ 390,047.00	\$ 281,660.00	\$ 387,000.00
Allowance	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00
Base Bid	\$ 549,000.00	\$ 415,047.00	\$ 306,660.00	\$ 412,000.00
Alternate #1	\$ 75,000.00	\$ 12,000.00	\$ 5,900.00	\$ 40,000.00
Base Bid Incl. Alt #1	\$ 624,000.00	\$ 427,047.00	\$ 312,560.00	\$ 452,000.00

RIO VISTA HIGH SCHOOL= Budget \$100,500

Bidders:	<u>Pro- Ex Construction</u>	<u>Diede Construction</u>	<u>B&M Builders</u>	<u>Hometown Construction</u>
Total Bid	\$ 134,000.00	\$ 93,258.00	\$ 109,465.00	\$ 80,800.00
Allowance	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00
Base Bid	\$ 159,000.00	\$ 118,258.00	\$ 134,465.00	\$ 105,800.00
Alternate #1	\$ 15,000.00	\$ 1,500.00	\$ 2,890.00	\$ 4,000.00
Base Bid Incl. Alt #1	\$ 174,000.00	\$ 119,758.00	\$ 137,355.00	\$ 109,800.00

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: 1

From: Tammy Busch, Asst. Superintendent of Business Services

Item Number: 21

Type of item: (Action, Consent Action or Information Only): Action

SUBJECT:

Request to Approve the Proposal from Capital Engineering to Provide Design Services for the Rio Vista High School Woodshop Dust Collection System

BACKGROUND:

At the November 14, 2023, Board of Education meeting, the Board approved proposals to repair the skylights of the woodshop and electrical services of the dust collector/install new motor starter with electric overload and service & lubricate and install two (2) new belts; new panel and circuit wiring.

The windows are in the process of being installed. Once the windows are installed the electrical work can safely commence. If the repairs are sufficient for the existing dust collection equipment to function, the design of a new system will not be needed.

However, if the dust collection system is not able to be repaired, we want to be prepared to engage with a designer so the system can be designed, bid and replaced as soon as possible so this classroom can be functional for student use.

STATUS:

RGMK has obtained a proposal from Capital Engineering to provide design services for a new dust collection system at Rio Vista High School Woodshop. We will only move forward with the design of a new dust collection system pending final outcome of the maintenance of the existing system after the glazing is installed.

PRESENTER:

Tammy Busch, Asst. Superintendent of Business Services and Katherine Wright,
Superintendent

OTHER PEOPLE WHO MIGHT BE PRESENT:

Maria Denney and Ralph Caputo, RGM Kramer

COST AND FUNDING SOURCES:

\$17,650 Funded by Measure J Bond Funds

RECOMMENDATION:

1. The Board authorize the Superintendent or designee to approve the proposal from Capital Engineering if the repair efforts scheduled to be completed later this month do not resolve the issues related to the dust collection system equipment.

Time allocated: 2 minutes



PROJECT NAME: RIO VISTA HS DUST COLLECTOR REPLACEMENT
OWNER: River Delta USD

PROPOSAL FOR: RIVER DELTA USD
PREPARED BY: Ryan Celaya

PROJECT #: 232090.00



November 29, 2023

Rich Dunlap
RGMK
3230 Monument Way
Concord, CA 94518

PROJECT: Rio Vista HS Dust Collector Replacement

SUBJECT: Proposal for Mechanical and Electrical Engineering Services
Project Number 232090.00

Dear Rich,

We are pleased to offer this fee proposal for engineering services for the subject Project.

A. Project Description: The project is located at the existing Shop Building at Rio Vista HS in Rio Vista, CA. The project scope is to replace the existing dust collector unit in-kind, connected to the existing exhaust ductwork that runs below slab to the building. We will coordinate with dust collector vendors to specify a unit that meets the original design intent and complies with all current codes. Reconnect the existing electrical connections to the unit, served by an existing electrical panel within the shop. It is assumed that the new dust collector will be mounted to the existing housekeeping pad.

B. Assumptions:

1. General:
 - a. As an "in-kind" equipment replacement project, DSA submittal/review will not be required in accordance with IR A-22.
 - b. Scope of work will be documented in no more than one phase of construction.
 - c. Project delivery method is Design-Bid-Build.
 - d. Drawings will be produced in 2D AutoCAD.
2. Renovation/Expansion of Existing Buildings:
 - a. The existing dust collection exhaust ductwork and outlets within the shop are Code compliant and of adequate capacity and type to serve the proposed remodel without modification.
 - b. The Electrical systems (normal power) and equipment including main service and vertical/horizontal electrical distribution system are Code compliant and are of adequate capacity and type to serve the proposed remodel without modification.



- c. Adequate record drawings are available and that our field work will consist of verification of the record drawings.

C. Scope of Services:

1. The scope of basic services shall include heating, ventilating and air conditioning design and electrical systems.
2. Schematic / Design Development Phase: Prepare diagrammatic plans and specifications including heating, ventilating and air conditioning systems and electrical systems design.
 - a. Deliverables:
 - 1) Drawings showing
 - (1) Equipment schedules with basic information for coordination purposes.
 - (2) Main equipment and main distribution components.
 - (3) Preliminary details and control diagrams.
 - (4) Provide equipment cut sheets.
 - b. Specifications:
 - 1) Preliminary 3-part book specification.
3. Construction Documents Phase: Prepare construction drawings and technical specifications including heating, ventilating and air conditioning systems and electrical systems design.
 - a. Deliverables:
 - 1) Final Drawings for bidding.
 - 2) Final 3-part book specifications for bidding.
 - 3) Review cost estimate prepared by others.
 - 4) Respond to and incorporate all review comments.
4. Bidding/Contract Award Phase: Prepare mechanical and electrical addenda and clarification documents, interpret mechanical and electrical Drawings and Specifications where required to clarify the intent of construction documents. Respond to bid RFIs.
5. Construction Phase: Review shop drawings and submittal data for general compliance with Capital's contract documents, respond to RFI's, prepare change order documents when required to meet existing Project conditions. Perform site visits during the course of construction, number as described in other paragraphs.
 - a. The fee included an initial review of a submittal for each specification and one back-check. This includes substitution requests, test and balance reports, chlorination reports, etc. Additional reviews due to



contractor changing mind on product provided are not included in the fee. Any additional reviews will be considered additional services.

6. Close-out Services Included: Review of record mechanical and electrical drawings produced by the Project subcontractor and cursory review of project operation and maintenance manuals for applicable systems.
7. Seismic Anchorage and Restraint Systems: Capital will not assume the responsibility for seismic restraint and gravity support systems and assumes such systems will be engineered, designed, and documented by others.
8. Title 24, Part 6, California Energy Code Commissioning Requirements:
 - a. T-24 commissioning is not required for alterations and renovation projects.

D. Clarifications:

1. We have provided for the following services in our fee proposal:
 - a. [4] hours of field investigation.
 - b. The following field visits during construction are included in the proposal:
 - 1) Final verified report observation,
 - 2) One additional as needed.
2. Record Drawings: Capital will update the permit drawings with the Contractor's redline markups of as-built conditions and issue record drawings. RFI, ASI, CCD references pasted onto contract documents by the Contractor, or provided as reference, does not suffice as record of the as-built conditions. Contractor shall document the as-built conditions using redlined markups of the contract documents.

E. Extra Services: The following services are not included in this proposal. The Engineer shall be compensated for providing these services when the Architect requests such services.

1. Design services to provide alternate bid items, and descriptions of phased construction except as identified above.
2. Employment of special sub consultants at the request of the Architect.
3. Preparation of cost estimates.
4. California Energy Code analysis or compliance documentation of Architectural, Mechanical or Lighting systems.
5. Partnering sessions, value engineering sessions or review of Contractor or Construction Manager proposed cost cutting recommendations.



6. Prolonged construction administration: We have based our proposal upon the schedule noted earlier. Prolonged support services for construction if initial construction time schedule is exceeded by more than 15% through no fault of the Consulting Engineer would result in a request of additional funding.
7. Review of submittals beyond described above.
8. Engineering work caused from construction that is installed differently from the permitted drawings if work could be installed as shown and permitted.
9. Engineering rework resulting from other trades not coordinating or installing work different from approved coordination drawings.

F. Materials and Services Furnished by Others:

1. All reproduction, including drawings, specifications and reports.
2. Division 01 and technical Sections commissioning specifications, Commissioning Plan, functional performance testing, preparation of Systems Manual, systems operations training, and Commissioning Report, for T-24 Commissioning.
3. Seismic restraint and gravity support systems design.

G. Compensation:

1. Basic Services: Compensation for Basic Services outlined under Paragraph B above shall be as follows:

Schematic / Design Development Phase	\$5,865.00
Construction Documents Phase	\$6,710.00
Bidding/Contract Phase	\$1,545.00
Construction Administration Phase	\$3,530.00
TOTAL	\$ 17,650.00

- a. The fee provided is valid for 180 days from the date of the proposal. If the Project begins after this time Capital may request an adjustment to the fee to reflect the extended start date.
2. Extra Services:
 - a. Compensation for authorized Extra Services as defined above shall be hourly at the rates indicated in the attached rate schedule.
3. Reimbursable Expenses:
 - a. We propose to invoice for reimbursable expenses including travel, mileage, rental car, tolls, lodging, per diem, and plotting based on our cost plus a 10% mark-up. Printing for distribution is not included in this



reimbursable expense. We anticipate that deliverables will be in PDF format or the team will have a common reproduction agency, where documents for major distribution will be sent, and we will be reimbursed directly by the client or the architect.

H. Insurance Coverage:

1. Professional Liability: \$1,000,000 per claim

Please call should you have any questions.

Thank you for the opportunity to offer our services.

Gratefully Yours,

A handwritten signature in blue ink, appearing to read 'R. Celaya', written in a cursive style.

Ryan Celaya, M.E., Senior Associate

CAPITAL ENGINEERING CONSULTANTS, INC.



TERMS AND CONDITIONS:

The following Terms and Conditions will govern all services performed on behalf of Client and are hereby incorporated into the Engineering Fee Proposal.

1. **Payment.** All fees and other charges will be billed to Client monthly and will be due and payable no later than 90 days after the date of invoice. Client will pay Capital, Inc. ("Capital") interest on past due amounts at the rate of 1.5 percent per month or the highest amount permitted by law, whichever is greater. In addition to all other remedies, Capital may withhold delivery of services, reports, plans, specifications, documents or other deliverables if Client fails to pay an invoice when due. Payment to Capital will not be withheld, postponed or made contingent on the construction, completion or success of the project or upon receipt by the Client of project funds, offsetting reimbursements, or credits from other parties. No withholding, deductions or offsets shall be made from Capital's compensation for any reason unless Capital has been found to be legally liable for such amounts. Payment of Capital's fees shall be a condition precedent to bringing any action or suit against Capital.
2. **Construction Contingency Fund.** The Client and Capital agree that changes may be required to the plans and specifications during the various phases of design, development, and construction, and therefore the cost of the project may exceed the estimated construction cost. The Client will set aside a reserve in the agreed to amount of the estimated construction cost as a contingency reserve to be used, as required, to pay for any such changes. The Client waives any claim against Capital or Capital's subconsultants with respect to any increased costs to the extent of the contingency reserve due to such changes or due to claims made by the construction Contractors relating to such changes.
3. **Additional Services.** Any services not explicitly described as being performed by Capital or its subconsultants are excluded. If agreed to in writing by Client and Capital, Capital will provide additional services. Client will pay Capital for such additional services in accordance with Capital's current fee schedule or as otherwise agreed by Client and Capital in writing. These Terms and Conditions will apply to all additional services provided by Capital. In the case of additional services added to the Engineering Fee Proposal, Capital's liability shall be limited to the extent of the additional fee for the specific additional services added.
4. **Professional Standards.** Subject to all conditions set forth herein, Capital will only be liable for breaching its obligation to perform its services to the level of competency maintained by other practicing engineering professionals in the same or similar community performing the same services at the same time as they were performed by Capital. Capital makes no warranties, either express or implied. Capital does not guarantee the completion or quality of performance of contracts by the construction contractor or subcontractors, or other third parties, nor accepts responsibility for their acts, omissions or any safety precautions.
5. **Independent Contractor.** The relationship of Capital to Client shall at all times be that of an independent Contractor. Capital shall not be liable for the acts of Client or its agents in performing Work.
6. **Document Ownership.** Capital holds copyright for all drawings, calculations, and other original documents produced by Capital and such documents shall be the property of Capital, except when otherwise provided by law, governmental requirement, or by prior agreement, these documents become public property or the property of the Client. A limited license is granted to use the documents for the specific purposes and project covered by the Agreement. Reproduction of these documents either in hard copy or soft copy (including posting on the web) is prohibited without copyright permission. No right to create modifications or derivatives of Capital documents is granted pursuant to this limited license. Any product, process, or technology described in the documents may be the subject of other Intellectual Property rights reserved by Capital. The drawings, specifications, and reproductions thereof are instruments of service to be used only for the specific project covered by the Agreement between the Client and Capital. Capital assumes no liability for misinterpretation, modification, or misuse by others of any instruments of service prepared by Capital in accordance with its services.
7. **Electronic Documents.** If Capital provides Client any design documents, including but not limited to plans and specifications, in electronic form ("Electronic Documents"), acceptance and use of the Electronic Documents by Client shall be at Client's sole risk and Client will: (a) Waive and covenant not to sue Capital alleging any inaccuracy or defect in the Electronic Documents; (b) Agree that Capital makes no representation with regard to the compatibility of the Electronic Documents with Client's software or hardware; and (c) to the fullest extent permitted by law, indemnify, hold harmless, reimburse and defend Capital from, for and against any alleged claim, damage, liability, or cost, including but not limited to attorneys' fees, that may arise from Client's



use of the Electronic Documents or any subsequent modification of the Electronic Documents by any person or entity.

8. **Schedule.** Capital will perform its services with reasonable diligence consistent with sound professional practice as ordinarily provided by engineers practicing in the same or similar locality under the same or similar circumstances. Client will require its other consultants and Contractors to incorporate into their schedules reasonable periods of time for Capital to perform its services and will require that they coordinate their services with Capital's services. Client is aware that many factors outside Capital's control may affect Capital's ability to timely perform and complete its services and Client agrees that Capital is not responsible for damages arising directly or indirectly from any delays, including but not limited to liquidated damages.
9. **Construction Support.** If specifically included in the scope of Capital's services, construction support services will be performed solely for the purpose of reviewing portions of the work for general conformance with the design concept set forth in the contract plans and specifications. These services are different from inspection or other quality-control services. The Client shall coordinate the Contractor's involvement in any Capital construction support services and shall provide Capital all necessary contracts and documents to perform the same. Capital is not a Contractor and does not provide the services of a Contractor under any circumstances. Capital will not supervise, direct or have control over any Contractor's work, nor will Capital have any responsibility for the means, methods, techniques, sequences or procedures of construction selected by the Contractor, nor will Capital be responsible for the Contractor's safety precautions and programs in connection with the work, nor will Capital be responsible for the Contractor's failure to perform the work in accordance with the requirements of the contract documents or applicable building or structural codes, nor will Capital be responsible for the acts or omissions of the Contractor or of any other persons or entities performing portions of the work, all of which are the sole responsibility of the Contractor or its agents.
10. **Submittal Review.** Capital will review and render appropriate services on shop drawings, product data, samples, and other submittals required by the contract documents. Such review shall be solely for general conformance with the design concept and the information shown on the contract documents. Capital's review will not include review of the accuracy or completeness of details, such as quantities, dimensions, weights or gauges, fabrication processes, construction means or methods, compliance with applicable building or structural codes, coordination of the work of other trades or construction safety precautions, all of which are the sole responsibility of the Contractor. Capital's review will be conducted with reasonable promptness while allowing sufficient time in Capital's judgment to permit adequate review. Review of a specific item shall not indicate acceptance of an assembly of which the item is a part. Capital will not review and will not be responsible for any deviations from the contract documents not clearly identified in writing on the submittal by the Contractor, nor will Capital be required to review partial submissions or those for which submissions for correlated items have not been received.
11. **Termination for Convenience.** Either Capital or Client may terminate this Agreement at any time with or without cause upon giving the other party ten (10) calendar days' prior written notice. Client will pay Capital for all services rendered and all costs incurred up to the date of termination, along with all other reasonable termination costs, including but not limited to expenses directly attributable to termination for which the Architect is not otherwise compensated, plus an amount for the Capital's anticipated profit on the value of the services not performed by Capital. If no notice of termination is given, Capital's obligations created by this Agreement will be terminated upon completion of the services.
12. **Notice of Deficiencies.** Client shall provide prompt written notice within thirty (30) days of when Client becomes aware or should have reasonably been aware of any fault or defect in the project, including errors, omissions or inconsistencies in the services and work product provided by Capital.
13. **Waiver of Subrogation.** Client and Capital waive all rights against each other for damages or loss to the extent covered by any available insurance. Client will require all of Client's insurers to waive subrogation against Capital and Client will contractually require all of its Contractors, consultants, and agents of any tier to have their respective insurers waive subrogation against Capital.
14. **Indemnity.** Subject to all provisions of this Agreement and to the fullest extent permitted by law, Client shall indemnify, hold harmless, reimburse and defend (with counsel of Capital's choice) Capital, its employees, officers, directors and agents from, for and against all actual or alleged claims, losses, damages, costs and expenses arising from or related to the work, the Project, or this Agreement (with the sole exception that Client will have no duty to indemnify Capital from claims or losses to the extent those claims or losses are caused by the fault or negligence of Capital or its employees as adjudicated by a court of competent jurisdiction). Under



no circumstances shall Capital be liable for any actual or alleged claims, losses, damages, costs and expenses arising from or related to the work, fault, or negligence of its subconsultants.

15. **Modifications.** *No change, modification, or amendment to this Agreement will be valid unless agreed to by both of the parties hereto in writing.*
16. **Successors and Assigns.** *This Agreement shall inure to the benefit of and shall be binding upon each of the parties hereto and such parties' partners, successors, executors, administrators and assigns.*
17. **Arbitration.** *Client agrees that any claim, damage, or dispute arising out of these Terms and Conditions or any services performed by Capital will be resolved by binding and confidential arbitration before a single arbitrator in the state where the project is located. The parties shall mutually select the arbitrator and the rules applicable to the arbitration process. Unless the parties mutually agree otherwise, the arbitration shall be administered by the American Arbitration Association in accordance with its Construction Industry Arbitration Rules in effect on the date of this Agreement. As a condition precedent to serving a demand for arbitration, Client agrees that it will obtain a written certificate executed by an independent design professional with similar experience on similar projects and licensed in the jurisdiction in which the project is located certifying that Capital failed to meet the applicable standard of care. Client will provide Capital with a copy of the certificate and all written analysis supporting the certificate's findings at least 30 days before serving a demand for arbitration. Client and Capital agree that any party hereto shall commence all claims and causes of action within the period specified by applicable law but in any case, not more than ten (10) years after the date of substantial completion of the project. Client and Capital waive all claims and causes of action not commenced or noticed in accordance with the time periods in this section.*
18. **Governing Law.** *The laws of the State that the project is constructed will govern the validity of this Agreement, its interpretation and performance. Any dispute arising in any way from this Agreement shall be subject to the jurisdiction of the courts of that State.*
19. **Client's Terms.** *Any terms and conditions set forth or referenced in Client's purchase order, requisition, or other notice of authorization to proceed are inapplicable to the services provided under this proposal or any related agreement, except when specifically accepted or confirmed in writing and signed by Capital.*
20. **Limitation of Liability.** *Client agrees that, in recognition of the relative risks and benefits of the project, Capital's aggregate joint, several and individual liability, whether for breach of contract, breach of warranty, negligence, professional malpractice, strict liability or otherwise will be limited to an amount no greater than \$1 million or Capital's fee, whichever amount is lesser. This provision will survive the termination or expiration of this Agreement.*
21. **Limitation of Remedy.** *Client covenants that it will not, under any circumstances, bring a lawsuit, arbitration demand, or claim of any kind against Capital's individual employees, officers, directors, or agents and that Client's sole remedy will be against Capital, Inc.*
22. **Entire Agreement.** *This Agreement contains all terms and conditions agreed on by the parties hereto, and no other agreements, oral or otherwise, regarding the subject matter of this Agreement, shall be deemed to exist, or bind any of the parties hereto.*



**Capital Engineering Consultants, Inc.
2023 Billing Rates**

Sr. Principal	\$245.00 / hour
Principal	\$223.00 / hour
Director	\$215.00 / hour
Sr. Project Manager	\$205.00 / hour
Project Manager	\$196.00 / hour
Field Services	\$192.00 / hour
Sr. Engineer	\$175.00 / hour
Engineer	\$160.00 / hour
Sr. Designer	\$150.00 / hour
Designer	\$138.00 / hour
Technician / CADD	\$127.00 / hour
Intern	\$120.00 / hour
Project Administrator	\$107.00 / hour
Sr. Admin.	\$75.00 / hour
Clerical / Admin.	\$60.00 / hour

Capital Engineering Consultants, Inc.

- Tax ID No. 94-1492674
- CA Business License # C0398323
- DIR # 100020121
- Small Business Certification ID 35757

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: 1

From: Tammy Busch, Asst. Superintendent of Business Services

Item Number: 23

Type of item: (Action, Consent Action or Information Only): Action

SUBJECT:

Request to Approve the Contract for the Rio Vista High School Low Voltage Systems Assessments for Telecom, Fire Alarms, Clock/Bell and PA Related Systems with O'Mahony & Myer

BACKGROUND:

Rio Vista High School has some issues with their existing low voltage systems. These issues include multiple fire alarm panels at the campus which are on different systems and have trouble communicating with each other, telecom issues which may make communication become unreliable which is why the campus uses radios to communicate and clock/bell/public address system which the district is currently improving by replacing some speakers. All of these systems are important for the safety of students and staff in emergency situations. It is important these systems are working properly.

STATUS:

RGMK has obtained a proposal from O'Mahony & Myer to provide an assessment of existing conditions of the telecom, fire alarm, clock/bell/public address and related systems and provide a report of their findings.

PRESENTER:

Tammy Busch, Asst. Superintendent of Business Services and Katherine Wright,
Superintendent

OTHER PEOPLE WHO MIGHT BE PRESENT:

Maria Denney and Ralph Caputo, RGM Kramer

COST AND FUNDING SOURCES:

\$3,000 Funded by Measure J Bond Funds

RECOMMENDATION: Staff recommends:

1. The Board approve the attached proposal from O'Mahony & Myer in the amount of \$3,000.

Time allocated: 2 minutes



O'MAHONY & MYER
ELECTRICAL ENGINEERING & LIGHTING DESIGN

San Rafael, California
Pacific Harbour, Fiji

November 29, 2023

Brian O'Mahony
Jan P. Myer
Paul Carey
Pieter Colenbrander
David Orgish
Galway O'Mahony

RGMK
3230 Monument Way
Concord, CA 94518

Attn: Rich Dunlap

Re: Rio Vista High School
Low Voltage Systems Assessments



Dear Rich,

Thank you for inviting O'Mahony & Myer to submit a proposal for Low Voltage System Assessment services for the Rio Vista High School. The following is our proposal:



Proposed Scope of Work:

1. Our scope of work will include a site visit to review existing conditions of the telecom, fire alarm, clock/bell, and PA related systems.
2. We will prepare a written narrative report of our findings, with recommendations on how these systems may need to be modified to support ongoing use of the facilities or modernization.
3. Assumes no drawing deliverables for this assessment phase. Written report only.
4. Includes coordination with RGMK and the District.

Proposed Fees:

We propose to provide the above listed Electrical Engineering Services for the following fixed fee:

Assessment Phase \$ 3,000

Billing Rates and Conditions:

Basic Services will be billed on a percentage-of-completion basis, per phase. Additional Services, if requested or required, will be billed on an hourly basis at the following rates:

Principal	\$235/hour
Project Manager	\$165/hour
Project Electrical Engineer	\$165/hour
Project Lighting Designer	\$165/hour
Electrical/Lighting Designer	\$140/hour
CAD Supervisor	\$120/hour
CAD Technician	\$110/hour
Administrative	\$105/hour

Out of pocket expenses, such as printing, plotting will be billed at cost. Billing will be submitted on a monthly basis, due and payable 30 days after the date of invoice.

Thank you again for the opportunity to submit this proposal. If you have any questions or comments, please do not hesitate to call.

Sincerely,



Pieter Colenbrander, P.E.
O'Mahony & Myer

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: 1

From: Tammy Busch, Asst. Superintendent of Business Services

Item Number: 23

Type of item: (Action, Consent Action or Information Only): Action

SUBJECT:

Request to Approve Change Order #1 for Delta High School / Clarksburg Middle School Cafeteria Modernization to Bobo Construction

BACKGROUND:

On June 13, 2023, the Board awarded a contract to Bobo Construction in the amount of \$3,973,300.

STATUS:

Construction at the DHS/CMS cafeteria began in July 2023. It is common to discover unforeseen conditions in modernization projects. This change order includes three items:

- Additional framing for three roof opening and framing changes for enlargement of west wall opening in mechanical room.
- Plaster removal from existing walls in boys' and girls' restrooms
- Removal of unforeseen drywall behind wood panel walls in several rooms

The project budget has a contingency amount of \$315,280. This change order is within the contingency amount.

PRESENTER:

Tammy Busch, Asst. Superintendent of Business Services and Katherine Wright, Superintendent

OTHER PEOPLE WHO MIGHT BE PRESENT:

Maria Denney and/or Ralph Caputo, RGM Kramer

COST AND FUNDING SOURCES:

\$17,653.90 - Measure K Bond Funds \$17,653.90

RECOMMENDATION: Staff recommends:

1. The Board to approve Change Order #1 to Bobo Construction for the DHS/CMS Cafeteria Modernization Project.

Time allocated: 3 minutes

CHANGE ORDER

Date: December 1, 2023

CO# 01

Project:

Delta HS & Clarksburg MS Cafeteria Modernization
52810 Netherlands Ave
Clarksburg, CA 95612

Architect:

HKIT Architects
538 Ninth Street Suite 240
Oakland, CA 94607

Owner:

River Delta Unified School District
445 Montezuma St
Rio Vista, CA 94571

Contractor:

Bobo Construction, Inc.
9722 Kent Street
Elk Grove, CA 95624

Pursuant to the Contract Documents, you are hereby authorized to make the following changes to the project. Execution of this change order represents full and final costs of all direct, indirect, and delay costs for the scope of services identified herein unless otherwise noted.

<u>Item #</u>	<u>Description</u>	<u>Amount</u>
1	PCO #013 Additional framing for three roof openings added in RFI #003 and framing changes for enlargement of west wall opening in Mechanical Room per RFI #031.	\$ 8,005.09
2	PCO #020 Plaster removal from existing walls in boys and girl's restrooms per RFI #53.1	\$ 5,783.24
3	PCO #021 Removal of unforeseen drywall behind wood panels walls in Rooms 113,114,115,116 and 120 of the Music Wing per RFI #057	\$ 3,865.57

TOTAL THIS CHANGE ORDER \$ 17,653.90

Original contract sum: \$3,973,300.00
Previous change orders: \$ -
Original contract amount plus/minus previous change orders \$3,973,300.00
Total amount of this change order \$ 17,653.90
Adjusted contract amount including this change order will be: \$ 3,990,953.90

The contract time will be adjusted by the following number of days: 0 days

Owner:

River Delta Unified School District
445 Montezuma St
Rio Vista, CA 94571

Contractor:

Bobo Construction, Inc.
9722 Kent Street
Elk Grove, CA 95624

By: _____

By: _____

Architect:

HKIT Architects
538 Ninth Street Suite 240
Oakland, CA 94607

Construction Manager

RGM Kramer, Inc.
3230 Monument Way
Concord, CA 945418

By: _____

By: _____



Bobo Construction Inc.
 9722 Kent Street
 Elk Grove, California 95624
 Phone: (916) 383-7777

Project: 3273 - Delta Hs & Clarksburg MS Mod.
 52870 Netherlands Road
 Clarksburg, California 95612

Prime Contract Potential Change Order #013: Additional Framing per RFIs 003 and 031

TO:	River Delta Unified School District 445 Montezuma Street Rio Vista, California 94571	FROM:	Bobo Construction, Inc. 9722 Kent Street Suite A Elk Grove, California 95624
PCO NUMBER/REVISION:	013 / 0	CONTRACT:	DELTA-001 - Standard Project Template Prime Contract
REQUEST RECEIVED FROM:		CREATED BY:	Margarita Diakou (Bobo Construction, Inc.)
STATUS:	Pending - In Review	CREATED DATE:	10/5/2023
REFERENCE:		PRIME CONTRACT CHANGE ORDER:	None
FIELD CHANGE:	No		
LOCATION:		ACCOUNTING METHOD:	Amount Based
SCHEDULE IMPACT:		PAID IN FULL:	No
EXECUTED:	No	SIGNED CHANGE ORDER RECEIVED DATE:	
		TOTAL AMOUNT:	\$8,005.09

POTENTIAL CHANGE ORDER TITLE: Additional Framing per RFIs 003 and 031

CHANGE REASON: Design Development

POTENTIAL CHANGE ORDER DESCRIPTION: *(The Contract Is Changed As Follows)*

CE #021 - Additional Framing per RFIs 003 and 031

Additional framing for three roof openings added in RFI 003 and enlargement of west wall existing opening at Mechanical Room per RFI 031.

ATTACHMENTS:

[Copy of Delta high P.C.O. #1 \(002\).pdf](#)

#	Budget Code	Description	Amount
1	6-126.S Rough Carpentry.Commitment	Additional Framing per RFIs 003 and 031	\$7,548.41
		Subtotal:	\$7,548.41
		GC Markup (5.00% Applies to Commitment.):	\$377.42
		Bond (1.00% Applies to all line item types.):	\$79.26
		Grand Total:	\$8,005.09

**PCO #013 in the amount of \$8,005.09 is Approved.
 Pending December Board Approval.
 Jessie Elquist, RGMK 11-13-23**

Erwin Won (HKIT Architects)

River Delta Unified School District
 445 Montezuma Street
 Rio Vista, California 94571

Bobo Construction, Inc.
 9722 Kent Street Suite A
 Elk Grove, California 95624

SIGNATURE _____ DATE _____ SIGNATURE _____ DATE _____ SIGNATURE _____ DATE _____

M&M Structures, Inc.

Date: 10-3-2023

Subject: R.F.I.#28, #31

Project: Delta high Café remodel

Add	Count	Price	total	Labor
Foreman	113.89 hr		22.5	
Journeyman	107.17		22.5	

Labor, lumber, hardware and equipment to frame 3 new roof openings and one new wall opening in existing framing.

Journeyman	2411.32	107.17 per hr.
Foreman	2562.52	113.89 per hr.
Lumber, hard equip	1590	
Total	6563.84	
15% markup	984.576	
P.C.O. total	7548.416	



BOBO
CONSTRUCTION, INC.

Bobo Construction Inc.
9722 Kent Street
Elk Grove, California 95624
P: (916) 383-7777

Project: 3273 Delta Hs & Clarksburg MS Mod.
52870 Netherlands Road
Clarksburg, California 95612

RFI #003: Direction on Relief/Exhaust Venting Installation.

Status	Closed on 08/04/23		
To	Bonnie Williams (HKIT Architects)	From	Margarita Diakou (Bobo Construction, Inc.) 9722 Kent Street Ste. A Elk Grove, California 95624
Date Initiated	Jul 12, 2023	Due Date	Jul 19, 2023
Location			
Cost Impact	Yes (Unknown)	Schedule Impact	TBD
Drawing Number	M6.01, M6.02	Reference	
Linked Drawings			
Received From	Josh Johnstone (Hometown Construction Inc)		
Copies To	Dave Adams (RGM Kramer, Inc.), Barton Copeland (Bobo Construction, Inc.), Margarita Diakou (Bobo Construction, Inc.), Jessie Elquist (RGM Kramer, Inc.), Christopher Gallup (River Delta Unified School District), Marlin Jones (RGM Kramer, Inc.), Ayana Toliver (RGM Kramer, Inc.), Erwin Won (HKIT Architects)		
Urgency	Normal		

Activity

Question

Question from Margarita Diakou Bobo Construction, Inc. on Wednesday, Jul 12, 2023 at 08:01 AM PDT

We received the following from Hometown Construction:

On the control diagram details (2/M6.01; 1&2/M6.02) it shows a motorized relief air damper in each of the systems. However, there is nothing in the HVAC floor plan (M2.01) or in the roof plan (M2.02) showing these dampers or how they are to be ducted.

Please see attached and provide direction on how and where the relief air is to be installed.

Thank you.

Attachments

[DHS-CMS RFI-1 Relief air venting.pdf](#)

Official Response

Response from Bonnie Williams HKIT Architects on Friday, Aug 4, 2023 at 09:04 AM PDT

See attached RFI response

Attachments

[RFI #03 Direction on Relief-Exhaust Venting Installation_HKIT Response 230803.pdf](#)

All Replies

Response from Bonnie Williams HKIT Architects on Friday, Aug 4, 2023 at 09:04 AM PDT

See attached RFI response

Attachments

[RFI #03 Direction on Relief-Exhaust Venting Installation_HKIT Response 230803.pdf](#)



BOBO
CONSTRUCTION, INC.

Bobo Construction Inc.
9722 Kent Street
Elk Grove, California 95624
P: (916) 383-7777

Project: 3273 Delta Hs & Clarksburg MS Mod.
52870 Netherlands Road
Clarksburg, California 95612

RFI #003: Direction on Relief/Exhaust Venting Installation.

Status	Open		
To	Bonnie Williams (HKIT Architects)	From	Margarita Diakou (Bobo Construction, Inc.) 9722 Kent Street Ste. A Elk Grove, California 95624
Date Initiated	Jul 12, 2023	Due Date	Jul 19, 2023
Location			
Cost Impact	Yes (Unknown)	Schedule Impact	TBD
Drawing Number	M6.01, M6.02	Reference	
Linked Drawings			
Received From	Josh Johnstone (Hometown Construction Inc)		
Copies To	Dave Adams (RGM Kramer, Inc.), Barton Copeland (Bobo Construction, Inc.), Margarita Diakou (Bobo Construction, Inc.), Jessie Elquist (RGM Kramer, Inc.), Christopher Gallup (River Delta Unified School District), Marlin Jones (RGM Kramer, Inc.), Ayana Toliver (RGM Kramer, Inc.), Erwin Won (HKIT Architects)		
Urgency	Normal		

Activity

Question

Question from Margarita Diakou Bobo Construction, Inc. on Wednesday, Jul 12, 2023 at 08:01 AM PDT

We received the following from Hometown Construction:

On the control diagram details (2/M6.01; 1&2/M6.02) it shows a motorized relief air damper in each of the systems. However, there is nothing in the HVAC floor plan (M2.01) or in the roof plan (M2.02) showing these dampers or how they are to be ducted.

Please see attached and provide direction on how and where the relief air is to be installed.

Thank you.

Attachments

[DHS-CMS RFI-1 Relief air venting.pdf](#)

Awaiting an Official Response

Please refer to attached drawings showing relief ducts/dampers and ventilators for each of the furnace systems.

Ryan Celaya, Capital, 8/3/23

Erwin Won
8/4/2023



RFI #031: Modifications to (E) Opening at W Wall of Mech Room 112 (URGENT)

Status	Open		
To	Bonnie Williams (HKIT Architects)	From	Margarita Diakou (Bobo Construction, Inc.) 9722 Kent Street Ste. A Elk Grove, California 95624
Date Initiated	Aug 21, 2023	Due Date	Aug 28, 2023
Location			
Cost Impact	TBD	Schedule Impact	TBD
Drawing Number	Reference		
Linked Drawings			
Received From	Josh Johnstone (Hometown Construction Inc)		
Copies To	Dave Adams (RGM Kramer, Inc.), Barton Copeland (Bobo Construction, Inc.), Margarita Diakou (Bobo Construction, Inc.), Jessie Elquist (RGM Kramer, Inc.), Christopher Gallup (River Delta Unified School District), Ayana Toliver (RGM Kramer, Inc.), Erwin Won (HKIT Architects)		
Urgency	Urgent		

Activity

Question

Question from Margarita Diakou Bobo Construction, Inc. on Monday, Aug 21, 2023 at 09:05 AM PDT

We received the following from Hometown:

Note 6 on M2.01 directs us to only use existing openings for ducting and any new opening requires approval from SEOR. The existing opening on the West wall of the Mechanical Room 112 through Corridor 117 will need to be enlarged to about 60"x20", to accommodate new ducting. This is part of the reason we recommend to drop the ceiling in Corridor 117 to 8'.

Please see attached for existing opening and advise how you want us to proceed.

Thank you.

Attachments

[IMG_2985001.jpg](#), [IMG_2986.jpg](#)

Awaiting an Official Response

ZFA RESPONSE:

It is our understanding that the openings in the photos attached are for the new ducts between Mech Room 112 and the Corridor 117.

The structural drawings indicate structural modifications for the new ducts on sheets S2.01 and S2.02. Structurally acceptable to enlarge existing opening as noted. Per callout on S2.01, provide structural framing for new opening per 19/S1.1. Notify Engineer if conflicts exist.

Lindsey Broderick, PE / Angie Sommer, SE
RETURNED: 8/23/23

Erwin Won
8/23/2023



1/4"

PIPE RACK
SUPPORT

STRIPS

4x BRACKET
PIPE RACK

PIPE RACK
SUPPORT

STRIPS

12 NB







Bobo Construction Inc.
 9722 Kent Street
 Elk Grove, California 95624
 Phone: (916) 383-7777

Project: 3273 - Delta Hs & Clarksburg MS Mod.
 52870 Netherlands Road
 Clarksburg, California 95612

Prime Contract Potential Change Order #PCO 020: Plaster Removal from (E) E and W Wals in B&G Restrooms

TO:	River Delta Unified School District 445 Montezuma Street Rio Vista, California 94571	FROM:	Bobo Construction, Inc. 9722 Kent Street Suite A Elk Grove, California 95624
PCO NUMBER/REVISION:	PCO 020 / 0	CONTRACT:	DELTA-001 - Standard Project Template Prime Contract
REQUEST RECEIVED FROM:		CREATED BY:	Margarita Diakou (Bobo Construction, Inc.)
STATUS:	Pending - In Review	CREATED DATE:	11/3/2023
REFERENCE:		PRIME CONTRACT CHANGE ORDER:	None
FIELD CHANGE:	No		
LOCATION:		ACCOUNTING METHOD:	Amount Based
SCHEDULE IMPACT:		PAID IN FULL:	No
EXECUTED:	No	SIGNED CHANGE ORDER RECEIVED DATE:	
		TOTAL AMOUNT:	\$5,783.24

POTENTIAL CHANGE ORDER TITLE: Plaster Removal from (E) E and W Wals in B&G Restrooms

CHANGE REASON: Existing Condition

POTENTIAL CHANGE ORDER DESCRIPTION: *(The Contract Is Changed As Follows)*

CE #032 - Plaster Removal from (E) E and W Wals in B&G Restrooms
 Remove plaster from East and West walls in Boys' and Girls' Restroom per RFI 53.1.

ATTACHMENTS:

[PALS PCO#11 RR Plaster.pdf](#)

#	Budget Code	Description	Amount
1	2-210.S Building Demolition.Commitment	Plaster Removal from (E) E and W Wals in B&G Restrooms	\$5,453.31
		Subtotal:	\$5,453.31
		GC Markup (5.00% Applies to Commitment.):	\$272.67
		Bond (1.00% Applies to all line item types.):	\$57.26
		Grand Total:	\$5,783.24

**PCO #020 in the amount of \$5,783.24 is Approved.
 Pending December Board Approval.
 Jessie Elquist, RGMK 11-13-23**

Erwin Won (HKIT Architects)

River Delta Unified School District
 445 Montezuma Street
 Rio Vista, California 94571

Bobo Construction, Inc.
 9722 Kent Street Suite A
 Elk Grove, California 95624

SIGNATURE _____ DATE _____ SIGNATURE _____ DATE _____ SIGNATURE _____ DATE _____

Change Order #11

PALS Job# 2765
Job Name Clarksburg MS
DATE 11/3/2023

To:	From:
Bobo Construction	P.A.L.S. PO Box 31986 Stockton, CA 95213-0326

DESCRIPTION OF CHANGE:
 Remove and dispose of plaster finishes in bathroom. Pricing includes removal of plaster material, detail and cleaning of containment areas, hauling and disposal of waste and all PPE, materials and equipment needed to complete abatement.

LABOR (INCLUDES PAYROLL TAX/FRINGE BENEFITS)

Trade	Hours		Rate	Total
Warehouse		x	0.00	0.00
Project Manager/Superintendent		x		0.00
Abatement Journeyman Straight Time	31	x	82.18	2547.58
Abatement Foreman Straight Time	3	x	87.18	261.54
Abatement Journeyman Over Time		x	103.10	0.00
Abatement Foreman Over Time		x	108.10	0.00
Abatement Journeyman Double Time		x	124.02	0.00
Abatement Foreman Double Time		x	129.02	0.00
LABOR TOTAL				2809.12

MATERIAL

Material	Quantity	Units		Unit Price	Total
4-Mil FR Poly Sheeting	1	Roll	x	73.00	73.00
6-Mil FR Poly Sheeting	1	Roll	x	102.00	102.00
Air Cassettes		EA	x	1.50	0.00
Asbestos/Lead/Mold Signs		EA	x	2.65	0.00
Asbestos Encapsulant		5 Gal	x	40.00	0.00
Asbestos Bridging Compound/Cloth		EA	x	281.00	0.00
Asbestos/Lead Danger Tape		Roll	x	9.38	0.00
Carpet Adhesive Remover		5 Gal	x	84.00	0.00
Disposal - Printed Bags		Roll	x	84.00	0.00
Disposal - Non-Printed Bags	2	Roll	x	74.00	148.00
Disposal Drums 55gal		EA	x	72.00	0.00
Glove Bags		EA	x	8.25	0.00
Hand Scraper		EA	x	10.35	0.00
Wire Brush - Large		EA	x	1.67	0.00
Wire Brush - Small		EA	x	0.90	0.00
Mastic Remover		5 Gal	x	116.00	0.00
Soybean Stripper		5 Gal	x	108.00	0.00
Paint Stripper		5 Gal	x	190.80	0.00
Poly Exhaust Tubing		Roll	x	57.70	0.00
Respirator Wipes		Box	x	9.35	0.00
Neg Air Filters - Pre		EA	x	0.85	0.00
Neg Air Filters - Secondary		Ea	x	5.65	0.00
Rags	0.5	Bag	x	43.85	21.93
Spray Adhesive	3	EA	x	6.35	19.05
Staples		Box	x	3.00	0.00
4" Scraper Blades		Box	x	4.75	0.00
Scrub Pads		EA	x	2.10	0.00
Towels	0.5	Box	x	42.65	21.33
Vacuum Bags		EA	x	3.15	0.00

White Tape	7	Roll	x	8.25	57.75
Blue Painters Tape		Roll	x	7.67	0.00
Duct Tape	6	Roll	x	7.67	46.02
Enviro-Wash/Cleaner		Gal	x	21.00	0.00
Plaster Wrap Encapsulant		EA	x	42.00	0.00
				MATERIAL SUBTOTAL	489.07
				Freight/Transportation Cost	0.00
				MATERIAL TOTAL	489.07

PPE

Gloves - Cloth/Latex	4	Pair	x	2.50	10.00
Chemical Gloves		Pair	x	5.97	0.00
Ear Plugs		Pair	x	1.50	0.00
Respirator	8	EA	x	12.39	99.12
Respirator - HEPA Filter	4	Pair	x	8.10	32.40
Respirator - Organic HEPA Cartridges		Pair	x	18.96	0.00
Safety Glasses	8	EA	x	3.00	24.00
Protective Suits	10	EA	x	6.93	69.30
Misc.			x		0.00
				PPE TOTAL	234.82

EQUIPMENT

	Quantity	Per		Unit Price	Total
Airless Sprayer	2	EA	x	125.00	250.00
Hudson Sprayer		EA	x	12.00	0.00
Low Volume Pump		EA	x	22.00	0.00
Lab Analytical		EA	x	25.00	0.00
Truck		HR	x	20.29	0.00
Trailer		HR	x	7.50	0.00
Decon Chamber	2	EA	x	14.00	28.00
Ladder 6'/8'/10'/12'	4	EA	x	18.00	72.00
Extention Ladder		EA	x	18.00	0.00
Shower Decon	1	EA/Day	x	25.00	25.00
Shower Filtration System		EA/Day	x	12.00	0.00
Fuel		Gal	x	5.50	0.00
Negative Air Machine	2	EA/Day	x	105.00	210.00
Power Tool Sawsall	1	EA/Day	x	38.00	38.00
Sawzall Blades		EA	x	2.79	0.00
Bobcat/Bucket		Hour	x	180.00	0.00
Scissor Lift		EA/Day	x	175.00	0.00
Temp Power Cord		EA	x	15.00	0.00
Temp Power Box		EA	x	35.00	0.00
Scaffold Rental		Day	x	150.00	0.00
Manometer	2	EA	x	30.00	60.00
HEPA Vacuum	2	EA	x	95.00	190.00
Generator/Air Compressor		Day	x	185.00	0.00
Blasting Set		Day	x	280.00	0.00
Blasting Media		Bag	x	6.00	0.00
Floor Buffer		EA	x	75.00	0.00
Floor Buffer Pads		EA	x	9.83	0.00
Jack/Chipping Hammer		EA	x	125.00	0.00
Water Blasting Rental		Day/Shift	x	5500.00	0.00
Misc.			x		0.00
				EQUIPMENT TOTAL	873.00

DISPOSAL

	Quantity	Units		Unit Price	Total
Lead Hazardous Drum		55g Drum	x	622.00	0.00
PCB Hazardous Drum		55g Drum	x	691.00	0.00
Asbestos Waste Drum		55g Drum	x	95.00	0.00
Asbestos Waste Bin		Bin	x	2600.00	0.00
Non-Hazardous	6	YD	x	56.00	336.00

DOP Testing		EA	x	275.00	0.00
Misc.			x		0.00
				MISC. TOTAL	336.00

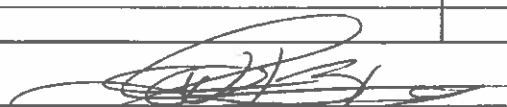
TOTAL LABOR COST					2,809.12
MATERIALS					489.07
PPE					234.82
DISPOSAL					336.00
EQUIPMENT COST					873.00
OH&P ON LABOR/ MATERIALS / PPE / DISPOSAL	15%				711.30
TOTAL W/MARKUP					5,453.31
FINAL COST					5,453.31

TIME & MATERIAL DAILY SHEET

Professional Asbestos and Lead Services, Inc. (PALS, Inc.)		Job Name: DELTA HS / CLARKSBURG MS CAFE MODERNIZATION		PALS Job Number: 2765	
PALS Supervisor Name (Printed): URIEL CAMARNO		Address: 5280 NETHERLANDS Rd CLARKSBURG			
Description of work: PLASTER REMOVAL / RESTROOMS AREA		Date: 9/21/23			
Worker Name		Worker Name		Worker Name	
	Hours	OT Hours		Hours	OT Hours
CARLOS SILVA	2				
DAVID SOSA	2				
FRANCISCO MCLGAREJO	2				
RAMON NUÑEZ	2				
MATERIAL USED	QUANTITY	EQUIPMENT USED		QUANTITY	
4-MIL FR POLY SHEETING (ROLL)		AIRLESS SPRAYER (EACH)		1	
6-MIL FR POLY SHEETING (ROLL)		HUDSON SPRAYER (EACH)			
AIR CASSETTES (EACH)		LOW VOLUMN PUMP (EACH)			
ASBESTOS / LEAD / MOLD SIGNS (EACH)		LAB ANALYTICAL (EACH)			
ASBESTOS ENCAPSULANT (5 GL)		TRUCK (EACH)			
ASBESTOS BRIDGING COMPOUND / CLOTH		TRAILER			
ASBESTOS / LEAD DANGER TAPE (ROLL)		DECON CHAMBER (EACH)			
CARPET ADHESIVE REMOVER (5 GALLONS)		LADDER (EACH) 8' 10' 12'		2	
DISPOSAL - PRINTED BAGS (ROLL)		EXTENSION LADDER			
DISPOSAL NON-PRINTED BAGS (ROLL)	1	SHOWER (EACH)			
DISPOSAL DRUMS (55 GL)		SHOWER FILTRATION SYSTEM (EACH)			
GLOVE BAGS (ROLL)		FUEL (GALLON)			
HAND SCRAPER (EACH)		NEG AIR MACHINE (EACH)			
WIRE BRUSH - LARGE (EACH)		POWER TOOL RENTAL (EACH) SAW DRILL OTHER		1	
WIRE BRUSH - SMALL (EACH)		SAWZALL BLADES (EACH)			
MASTIC REMOVER (5 GALLONS)		BOBCAT / BUCKET (DAY)			
SOYBEAN STRIPPER (5 GALLONS)		SCISSOR LIFT (EACH)			
PAINT STRIPPER (5 GALLONS)		TEMP POWER CORD			
POLY EXHAUST TUBING (ROLL)		TEMP POWER BOX			
RESPIRATOR WIPES (BOX)		SCAFFOLD RENTAL			
NEG AIR FILTERS - PRE (EACH)		MANOMETER (EACH)		1	
NEG AIR FILTERS - SECONDARY (EACH)		HEPA VACUUM (EACH)		1	
RAGS (BUNDLE)		GENERATOR / AIR COMPRESSOR (DAY)			
SPRAY ADHESIVE (CAN / CASE)		BLASTING SET (COMPLETE)			
STAPLES (BOX)		BLAST MEDIA (BAG)			
SCRAPER BLADES (PKG)		FLOOR BUFFER (EACH)			
SCRUB PADS (BOX)		FLOOR BUFFER PADS (EACH / CASE)			
TOWELS (BOX)	1/4	JACK / CHIPPING HAMMER (EACH)			
VACUUM BAGS (EACH)		DOP TESTING OF HEPAS (EACH)			
WHITE TAPE (ROLL / CASE)	1				
BLUE TAPE (ROLL / CASE)		DISPOSAL			
DUCT TAPE (ROLL / CASE)	1				
ENVIRO WASH / CLEANER (GALLON)		LEAD HAZARDOUS (PER DRUM)			
		PCB HAZARDOUS (PER DRUM)			
		ASBESTOS WASTE (PER DRUM)			
		ASBESTOS WASTE (YARD)			
		NON-HAZARDOUS (YARD)		6 YARDS	
		LIGHT TUBES (EACH / BOX)			
		WASTE PICK-UP FEE			
PPE					
GLOVES - CLOTH / LATEX (PAIR)					
CHEMICAL GLOVES (PAIR)					
EAR PLUGS (EACH)					
RESPIRATORS (EACH)	4				
RESPIRATOR - HEPA FILTER (PAIR)	4				
RESPIRATOR - VAPOR ORGANIC HEPA CART (PR)					
SAFETY GLASSES (PAIR)	4				
PROTECTIVE SUITS (EACH / CASE)	4				

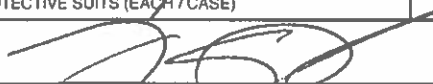

OWNER REPRESENTATIVE SIGNATURE

VERIFIED
TIME
ONLY


PALS SUPERVISOR SIGNATURE

TIME & MATERIAL DAILY SHEET

Professional Asbestos and Lead Services, Inc. (PALS, Inc.)		Job Name: DELTA HS CLARKSBURG MS CAFE		PALS Job Number: 2765	
		Address: 52810 NETHERLAND RD CLARKSBURG		Date: 9/22/23	
PALS Supervisor Name (Printed) URIEL CAMARGO		Description of work: DEMO PLASTER AND CLEAN UP RESTROOMS AREA			
Worker Name		Worker Name		Worker Name	
	Hours	OT Hours		Hours	OT Hours
RAMON NUÑEZ	6				
JUAN SILVA	6				
FRANCISCO MELGAREJO	6				
ENRIQUE TOVAR	3				
URIEL CAMARGO	3				
MATERIAL USED	QUANTITY		EQUIPMENT USED		QUANTITY
4-MIL FR POLY SHEETING (ROLL)			AIRLESS SPRAYER (EACH)		1
6-MIL FR POLY SHEETING (ROLL)			HUDSON SPRAYER (EACH)		
AIR CASSETTES (EACH)			LOW VOLUMN PUMP (EACH)		
ASBESTOS / LEAD / MOLD SIGNS (EACH)			LAB ANALYTICAL (EACH)		
ASBESTOS ENCAPSULANT (5 GL)			TRUCK (EACH)		
ASBESTOS BRIDGING COMPOUND / CLOTH			TRAILER		
ASBESTOS / LEAD DANGER TAPE (ROLL)			DECON CHAMBER (EACH)		2
CARPET ADHESIVE REMOVER (5 GALLONS)			LADDER (EACH) 9' 10' 12'		2
DISPOSAL - PRINTED BAGS (ROLL)			EXTENSION LADDER		
DISPOSAL NON-PRINTED BAGS (ROLL)	1		SHOWER (EACH)		1
DISPOSAL DRUMS (55 GL)			SHOWER FILTRATION SYSTEM (EACH)		
GLOVE BAGS (ROLL)			FUEL (GALLON)		
HAND SCRAPER (EACH)			NEG AIR MACHINE (EACH)		2
WIRE BRUSH - LARGE (EACH)			POWER TOOL RENTAL (EACH) SAW DRILL OTHER		
WIRE BRUSH - SMALL (EACH)			SAWZALL BLADES (EACH)		
MASTIC REMOVER (5 GALLONS)			BOBCAT / BUCKET (DAY)		
SOYBEAN STRIPPER (5 GALLONS)			SCISSOR LIFT (EACH)		
PAINT STRIPPER (5 GALLONS)			TEMP POWER CORD		
POLY EXHAUST TUBING (ROLL)			TEMP POWER BOX		
RESPIRATOR WIPES (BOX)			SCAFFOLD RENTAL		
NEG AIR FILTERS - PRE (EACH)			MANOMETER (EACH)		1
NEG AIR FILTERS - SECONDARY (EACH)			HEPA VACUUM (EACH)		1
RAGS (BUNDLE)	1/2		GENERATOR / AIR COMPRESSOR (DAY)		
SPRAY ADHESIVE (CAN / CASE)			BLASTING SET (COMPLETE)		
STAPLES (BOX)			BLAST MEDIA (BAG)		
SCRAPER BLADES (PKG)			FLOOR BUFFER (EACH)		
SCRUB PADS (BOX)			FLOOR BUFFER PADS (EACH / CASE)		
TOWELS (BOX)	1/4		JACK / CHIPPING HAMMER (EACH)		
VACUUM BAGS (EACH)	3		DOP TESTING OF HEPAS (EACH)		
WHITE TAPE (ROLL / CASE)	3				
BLUE TAPE (ROLL / CASE)					
DUCT TAPE (ROLL / CASE)	2				
ENVIRO WASH / CLEANER (GALLON)					
			DISPOSAL		
			LEAD HAZARDOUS (PER DRUM)		
			PCB HAZARDOUS (PER DRUM)		
PPE			ASBESTOS WASTE (PER DRUM)		
			ASBESTOS WASTE (YARD)		
GLOVES - CLOTH / LATEX (PAIR)	4		NON-HAZARDOUS (YARD)		
CHEMICAL GLOVES (PAIR)			LIGHT TUBES (EACH / BOX)		
EAR PLUGS (EACH)			WASTE PICK-UP FEE		
RESPIRATORS (EACH)	4				
RESPIRATOR - HEPA FILTER (PAIR)					
RESPIRATOR - VAPOR ORGANIC HEPA CART (PR)					
SAFETY GLASSES (PAIR)	4				
PROTECTIVE SUITS (EACH / CASE)	6				


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BOBO
CONSTRUCTION, INC.

Bobo Construction Inc.
9722 Kent Street
Elk Grove, California 95624
P: (916) 383-7777

Project: 3273 Delta Hs & Clarksburg MS Mod.
52870 Netherlands Road
Clarksburg, California 95612

RFI #053.1: Clarification on (E) East and West Furring Walls in Boys' and Girls' Restrooms (URGENT)

Status	Open		
To	Bonnie Williams (HKIT Architects)	From	Margarita Diakou (Bobo Construction, Inc.) 9722 Kent Street Ste. A Elk Grove, California 95624
Date Initiated	Sep 18, 2023	Due Date	Sep 25, 2023
Location			
Cost Impact	TBD	Schedule Impact	TBD
Drawing Number	Reference		
Linked Drawings			
Received From	Barton Copeland (Bobo Construction, Inc.)		
Copies To	Dave Adams (RGM Kramer, Inc.), Barton Copeland (Bobo Construction, Inc.), Margarita Diakou (Bobo Construction, Inc.), Jessie Elquist (RGM Kramer, Inc.), Christopher Gallup (River Delta Unified School District), Rachel Matsumoto (RGM Kramer, Inc.), Ayana Toliver (RGM Kramer, Inc.), Erwin Won (HKIT Architects)		
Urgency	Urgent		

Activity

Question

Question from Margarita Diakou Bobo Construction, Inc. on Monday, Sep 18, 2023 at 12:13 PM PDT

The (E) West wall in the Girls' Restroom currently has a 2x2 furring wall with 7/8" of plaster. The (E) East wall in the Boys' restroom has 2x2 furring, a 2x4 wall in front of it and 7/8" plaster. It has been discussed that in order for the epoxy floor and the 6" epoxy cove base to be installed we may need to have concrete curbs for the epoxy to build up against.

Please advise how you want us to proceed.

Thank you.

Awaiting an Official Response

Remove 7/8" plaster finish on walls and 2x4 framing on the east boys restroom wall. 2x2 furring is to remain. Install 1/2" cement board to walls of restroom, including the north to be a backer for both the tile and the epoxy cove base. Add furring to the bottom of the wall as necessary to fill gaps, (recess at wall base).

**-Melissa Regan-Byers
HKIT Architects
9/21/2023**



Bobo Construction Inc.
9722 Kent Street
Elk Grove, California 95624
Phone: (916) 383-7777

Project: 3273 - Delta Hs & Clarksburg MS Mod.
52870 Netherlands Road
Clarksburg, California 95612

Prime Contract Potential Change Order #021: Concealed Drywall Behind Wood Paneled Walls per RFI 057

Table with 4 columns: TO, FROM, PCO NUMBER/REVISION, CONTRACT, REQUEST RECEIVED FROM, CREATED BY, STATUS, CREATED DATE, REFERENCE, PRIME CONTRACT CHANGE ORDER, FIELD CHANGE, LOCATION, ACCOUNTING METHOD, SCHEDULE IMPACT, PAID IN FULL, EXECUTED, SIGNED CHANGE ORDER RECEIVED DATE, TOTAL AMOUNT.

POTENTIAL CHANGE ORDER TITLE: Concealed Drywall Behind Wood Paneled Walls per RFI 057

CHANGE REASON: Existing Condition

POTENTIAL CHANGE ORDER DESCRIPTION: (The Contract Is Changed As Follows)

CE #033 - Concealed Drywall Behind Wood Paneled Walls
Concealed drywall under wall paneling in the following areas:
Rm113 two spots
Rm 114 two spots
Rm 115 two spots
Rm 116 one spot
Rm 120 music rm three spots

PCO #021 in the amount of \$3,865.57 is Approved.
Pending December Board Approval.
Jessie Elquist, RGMK 11-13-23

ATTACHMENTS:

PALS PCO#10 Concealed Drywall.pdf

Table with 4 columns: #, Budget Code, Description, Amount. Includes line items for demolition, subtotal, GC Markup, Bond, and Grand Total.

Erwin Won (HKIT Architects)

River Delta Unified School District
445 Montezuma Street
Rio Vista, California 94571

Bobo Construction, Inc.
9722 Kent Street Suite A
Elk Grove, California 95624

SIGNATURE DATE SIGNATURE DATE SIGNATURE DATE

Change Order #10

PALS Job# 2765
Job Name Clarksburg MS
DATE 11/3/2023

To:	From:
Bobo Construction	P.A.L.S.
	PO Box 31986
	Stockton, CA 95213-0326

DESCRIPTION OF CHANGE:
 Remove and dispose of select drywall concealed behind wooden walls. Pricing includes set up of containment in additional areas, removal of material, detail and cleaning of containment areas, hauling and disposal of waste and all PPE, materials and equipment needed to complete abatement.

LABOR (INCLUDES PAYROLL TAX/FRINGE BENEFITS)

Trade	Hours		Rate	Total
Warehouse		x	0.00	0.00
Project Manager/Superintendent		x		0.00
Abatement Journeyman Straight Time	20.5	x	82.18	1684.69
Abatement Foreman Straight Time	1.5	x	87.18	130.77
Abatement Journeyman Over Time		x	103.10	0.00
Abatement Foreman Over Time		x	108.10	0.00
Abatement Journeyman Double Time		x	124.02	0.00
Abatement Foreman Double Time		x	129.02	0.00
LABOR TOTAL				1815.46

MATERIAL

Material	Quantity	Units		Unit Price	Total
4-Mil FR Poly Sheeting	1	Roll	x	73.00	73.00
6-Mil FR Poly Sheeting	1	Roll	x	102.00	102.00
Air Cassettes		EA	x	1.50	0.00
Asbestos/Lead/Mold Signs		EA	x	2.65	0.00
Asbestos Encapsulant		5 Gal	x	40.00	0.00
Asbestos Bridging Compound/Cloth		EA	x	281.00	0.00
Asbestos/Lead Danger Tape		Roll	x	9.38	0.00
Carpet Adhesive Remover		5 Gal	x	84.00	0.00
Disposal - Printed Bags	0.5	Roll	x	84.00	42.00
Disposal - Non-Printed Bags	0.1	Roll	x	74.00	7.40
Disposal Drums 55gal		EA	x	72.00	0.00
Glove Bags		EA	x	8.25	0.00
Hand Scraper		EA	x	10.35	0.00
Wire Brush - Large		EA	x	1.67	0.00
Wire Brush - Small		EA	x	0.90	0.00
Mastic Remover		5 Gal	x	116.00	0.00
Soybean Stripper		5 Gal	x	108.00	0.00
Paint Stripper		5 Gal	x	190.80	0.00
Poly Exhaust Tubing		Roll	x	57.70	0.00
Respirator Wipes		Box	x	9.35	0.00
Neg Air Filters - Pre	4	EA	x	0.85	3.40
Neg Air Filters - Secondary	4	Ea	x	5.65	22.60
Rags	0.5	Bag	x	43.85	21.93
Spray Adhesive	3	EA	x	6.35	19.05
Staples		Box	x	3.00	0.00
4" Scraper Blades		Box	x	4.75	0.00
Scrub Pads		EA	x	2.10	0.00
Towels	0.5	Box	x	42.65	21.33
Vacuum Bags		EA	x	3.15	0.00

White Tape	4	Roll	x	8.25	33.00
Blue Painters Tape		Roll	x	7.67	0.00
Duct Tape	9	Roll	x	7.67	69.03
Enviro-Wash/Cleaner		Gal	x	21.00	0.00
Plaster Wrap Encapsulant		EA	x	42.00	0.00
				MATERIAL SUBTOTAL	414.73
				Freight/Transportation Cost	0.00
				MATERIAL TOTAL	414.73

PPE

Gloves - Cloth/Latex		Pair	x	2.50	0.00
Chemical Gloves		Pair	x	5.97	0.00
Ear Plugs		Pair	x	1.50	0.00
Respirator	3	EA	x	12.39	37.17
Respirator - HEPA Filter	3	Pair	x	8.10	24.30
Respirator - Organic HEPA Cartridges		Pair	x	18.96	0.00
Safety Glasses	3	EA	x	3.00	9.00
Protective Suits	3	EA	x	6.93	20.79
Misc.			x		0.00
				PPE TOTAL	91.26

EQUIPMENT

	Quantity	Per		Unit Price	Total
Airless Sprayer		EA	x	125.00	0.00
Hudson Sprayer		EA	x	12.00	0.00
Low Volume Pump		EA	x	22.00	0.00
Lab Analytical		EA	x	25.00	0.00
Truck		HR	x	20.29	0.00
Trailer		HR	x	7.50	0.00
Decon Chamber	4	EA	x	14.00	56.00
Ladder 6'/8'/10'/12'	2	EA	x	18.00	36.00
Extention Ladder		EA	x	18.00	0.00
Shower Decon	2	EA/Day	x	25.00	50.00
Shower Filtration System		EA/Day	x	12.00	0.00
Fuel		Gal	x	5.50	0.00
Negative Air Machine	4	EA/Day	x	105.00	420.00
Power Tool Sawsall	1	EA/Day	x	38.00	38.00
Sawzall Blades	4	EA	x	2.79	11.16
Bobcat/Bucket		Hour	x	180.00	0.00
Scissor Lift		EA/Day	x	175.00	0.00
Temp Power Cord		EA	x	15.00	0.00
Temp Power Box		EA	x	35.00	0.00
Scaffold Rental		Day	x	150.00	0.00
Manometer	1	EA	x	30.00	30.00
HEPA Vacuum	1	EA	x	95.00	95.00
Generator/Air Compressor		Day	x	185.00	0.00
Blasting Set		Day	x	280.00	0.00
Blasting Media		Bag	x	6.00	0.00
Floor Buffer		EA	x	75.00	0.00
Floor Buffer Pads		EA	x	9.83	0.00
Jack/Chipping Hammer		EA	x	125.00	0.00
Water Blasting Rental		Day/Shift	x	5500.00	0.00
Misc.			x		0.00
				EQUIPMENT TOTAL	736.16

DISPOSAL

	Quantity	Units		Unit Price	Total
Lead Hazardous Drum		55g Drum	x	622.00	0.00
PCB Hazardous Drum		55g Drum	x	691.00	0.00
Asbestos Waste Drum		55g Drum	x	95.00	0.00
Asbestos Waste Bin		Bin	x	2600.00	0.00
Non-Hazardous	2	YD	x	56.00	112.00

DOP Testing		EA	x	275.00	0.00
Misc.			x		0.00
				MISC. TOTAL	112.00

TOTAL LABOR COST					1,815.46
MATERIALS					414.73
PPE					91.26
DISPOSAL					112.00
EQUIPMENT COST					736.16
OH&P ON LABOR/ MATERIALS / PPE / DISPOSAL	15%				475.44
TOTAL W/MARKUP					3,645.05
FINAL COST					3,645.05

TIME & MATERIAL DAILY SHEET

Professional Asbestos and Lead Services, Inc. (PALS, Inc.)		Job Name: DELTA HS / CLARKSBURG MS CAFE MODERNIZATION		PALS Job Number: 2765	
		Address: 52810 NETHERLANDS RD CLARKSBURG		Date: 9/21/23	
PALS Supervisor Name (Printed) URIEL CAMARAO		Description of work: DRYWALL REMOVAL / BEHIND WOOD 10 AREAS			
Worker Name		Worker Name		Worker Name	
	Hours	OT Hours		Hours	OT Hours
FRANCISCO CALDERON	2				
LEONEL GASTELUM	2				
JULIO MENDEZ	2				
MATERIAL USED		QUANTITY		EQUIPMENT USED	
4-MIL FR POLY SHEETING (ROLL)				AIRLESS SPRAYER (EACH)	
6-MIL FR POLY SHEETING (ROLL)				HUDSON SPRAYER (EACH)	
AIR CASSETTES (EACH)				LOW VOLUMN PUMP (EACH)	
ASBESTOS / LEAD / MOLD SIGNS (EACH)				LAB ANALYTICAL (EACH)	
ASBESTOS ENCAPSULANT (5 GL)				TRUCK (EACH)	
ASBESTOS BRIDGING COMPOUND / CLOTH				TRAILER	
ASBESTOS / LEAD DANGER TAPE (ROLL)				DECON CHAMBER (EACH)	
CARPET ADHESIVE REMOVER (5 GALLONS)				LADDER (EACH) 8' 10' 12'	
DISPOSAL - PRINTED BAGS (ROLL) EACH		40		EXTENSION LADDER	
DISPOSAL NON-PRINTED BAGS (ROLL)				SHOWER (EACH)	
DISPOSAL DRUMS (55 GL)				SHOWER FILTRATION SYSTEM (EACH)	
GLOVE BAGS (ROLL)				FUEL (GALLON)	
HAND SCRAPER (EACH)				NEG AIR MACHINE (EACH)	
WIRE BRUSH - LARGE (EACH)				POWER TOOL RENTAL (EACH) SAW DRILL OTHER	
WIRE BRUSH - SMALL (EACH)				SAWZALL BLADES (EACH)	
MASTIC REMOVER (5 GALLONS)				BOBCAT / BUCKET (DAY)	
SOYBEAN STRIPPER (5 GALLONS)				SCISSOR LIFT (EACH)	
PAINT STRIPPER (5 GALLONS)				TEMP POWER CORD	
POLY EXHAUST TUBING (ROLL)				TEMP POWER BOX	
RESPIRATOR WIPES (BOX)				SCAFFOLD RENTAL	
NEG AIR FILTERS - PRE (EACH)		4		MANOMETER (EACH)	
NEG AIR FILTERS - SECONDARY (EACH)		4		HEPA VACUUM (EACH)	
RAGS (BUNDLE)				GENERATOR / AIR COMPRESSOR (DAY)	
SPRAY ADHESIVE (CAN / CASE)				BLASTING SET (COMPLETE)	
STAPLES (BOX)				BLAST MEDIA (BAG)	
SCRAPER BLADES (PKG)				FLOOR BUFFER (EACH)	
SCRUB PADS (BOX)				FLOOR BUFFER PADS (EACH / CASE)	
TOWELS (BOX)		1/4		JACK / CHIPPING HAMMER (EACH)	
VACUUM BAGS (EACH)		2		DOP TESTING OF HEPAS (EACH)	
WHITE TAPE (ROLL / CASE)		1			
BLUE TAPE (ROLL / CASE)				DISPOSAL	
DUCT TAPE (ROLL / CASE)		1			
ENVIRO WASH / CLEANER (GALLON)				LEAD HAZARDOUS (PER DRUM)	
				PCB HAZARDOUS (PER DRUM)	
PPE				ASBESTOS WASTE (PER DRUM)	
				ASBESTOS WASTE (YARD)	
GLOVES - CLOTH / LATEX (PAIR)				NON-HAZARDOUS (YARD)	
CHEMICAL GLOVES (PAIR)				LIGHT TUBES (EACH / BOX)	
EAR PLUGS (EACH)				WASTE PICK-UP FEE	
RESPIRATORS (EACH)		3			
RESPIRATOR - HEPA FILTER (PAIR)		3			
RESPIRATOR - VAPOR ORGANIC HEPA CART (PR)					
SAFETY GLASSES (PAIR)		3			
PROTECTIVE SUITS (EACH / CASE)		3			
				2 YARDS	


OWNER REPRESENTATIVE SIGNATURE

**VERIFIED
TIME
ONLY**


PALS SUPERVISOR SIGNATURE

TIME & MATERIAL DAILY SHEET

Professional Asbestos and Lead Services, Inc. (PALS, Inc.)		Job Name: DELTA HS CLARKSBURG MS CAFE		PALS Job Number: 2765	
		Address: 52810 NETHERLAND CLARKSBURG.		Date: 9/22/23	
PALS Supervisor Name (Printed) URIEL CAMARGO		Description of work: DRYWALL REMOVAL AND CLEAN UP			
Worker Name		Worker Name		Worker Name	
	Hours	OT Hours		Hours	OT Hours
FRANCISCO CALDERON	6				
ARMANDO ALVAREZ	6				
LEONEL GASTELUM	6				
ENRIQUE TOVAR	3				
URIEL CAMARGO	3				
MATERIAL USED	QUANTITY		EQUIPMENT USED	QUANTITY	
4-MIL FR POLY SHEETING (ROLL)			AIRLESS SPRAYER (EACH)	1	
6-MIL FR POLY SHEETING (ROLL)			HUDSON SPRAYER (EACH)		
AIR CASSETTES (EACH)			LOW VOLUMN PUMP (EACH)		
ASBESTOS / LEAD / MOLD SIGNS (EACH)			LAB ANALYTICAL (EACH)		
ASBESTOS ENCAPSULANT (5 GL)			TRUCK (EACH)		
ASBESTOS BRIDGING COMPOUND / CLOTH			TRAILER		
ASBESTOS / LEAD DANGER TAPE (ROLL)			DECON CHAMBER (EACH)	2	
CARPET ADHESIVE REMOVER (5 GALLONS)			LADDER (EACH) 8 10' 12'		
DISPOSAL - PRINTED BAGS (ROLL)	10		EXTENSION LADDER		
DISPOSAL NON-PRINTED BAGS (ROLL)	10		SHOWER (EACH)	1	
DISPOSAL DRUMS (55 GL)			SHOWER FILTRATION SYSTEM (EACH)		
GLOVE BAGS (ROLL)			FUEL (GALLON)		
HAND SCRAPER (EACH)			NEG AIR MACHINE (EACH)	2	
WIRE BRUSH - LARGE (EACH)			POWER TOOL RENTAL (EACH) S/W DRILL OTHER		
WIRE BRUSH - SMALL (EACH)			SAWZALL BLADES (EACH)	2	
MASTIC REMOVER (5 GALLONS)			BOBCAT / BUCKET (DAY)		
SOYBEAN STRIPPER (5 GALLONS)			SCISSOR LIFT (EACH)		
PAINT STRIPPER (5 GALLONS)			TEMP POWER CORD		
POLY EXHAUST TUBING (ROLL)			TEMP POWER BOX		
RESPIRATOR WIPES (BOX)			SCAFFOLD RENTAL		
NEG AIR FILTERS - PRE (EACH)			MANOMETER (EACH)		
NEG AIR FILTERS - SECONDARY (EACH)			HEPA VACUUM (EACH)		
RAGS (BUNDLE)	1/2		GENERATOR / AIR COMPRESSOR (DAY)		
SPRAY ADHESIVE (CAN / CASE)			BLASTING SET (COMPLETE)		
STAPLES (BOX)			BLAST MEDIA (BAG)		
SCRAPER BLADES (PKG)			FLOOR BUFFER (EACH)		
SCRUB PADS (BOX)			FLOOR BUFFER PADS (EACH / CASE)		
TOWELS (BOX)	1/4		JACK / CHIPPING HAMMER (EACH)		
VACUUM BAGS (EACH)			DOP TESTING OF HEPAS (EACH)		
WHITE TAPE (ROLL / CASE)					
BLUE TAPE (ROLL / CASE)			DISPOSAL		
DUCT TAPE (ROLL / CASE)					
ENVIRO WASH / CLEANER (GALLON)			LEAD HAZARDOUS (PER DRUM)		
			PCB HAZARDOUS (PER DRUM)		
PPE			ASBESTOS WASTE (PER DRUM)		
			ASBESTOS WASTE (YARD)		
GLOVES - CLOTH / LATEX (PAIR)			NON-HAZARDOUS (YARD)		
CHEMICAL GLOVES (PAIR)			LIGHT TUBES (EACH / BOX)		
EAR PLUGS (EACH)			WASTE PICK-UP FEE		
RESPIRATORS (EACH)				CONTRACT & T&M WORK	
RESPIRATOR - HEPA FILTER (PAIR)					
RESPIRATOR - VAPOR ORGANIC HEPA CART (PR)					
SAFETY GLASSES (PAIR)					
PROTECTIVE SUITS (EACH / CASE)					

50/50 split

[Signature]

OWNER REPRESENTATIVE SIGNATURE

VERIFIED
TIME
ONLY

[Signature]

PALS SUPERVISOR SIGNATURE



BOBO
CONSTRUCTION, INC.

Bobo Construction Inc.
9722 Kent Street
Elk Grove, California 95624
P: (916) 383-7777

Project: 3273 Delta Hs & Clarksburg MS Mod.
52870 Netherlands Road
Clarksburg, California 95612

RFI #057: Concealed Drywall Under Wood in Rooms 113, 114, 115, 116 and 120 (URGENT)

Status	Open		
To	Jessie Elquist (RGM Kramer, Inc.)	From	Margarita Diakou (Bobo Construction, Inc.) 9722 Kent Street Ste. A Elk Grove, California 95624
Date Initiated	Sep 19, 2023	Due Date	Sep 26, 2023
Location			
Cost Impact	Yes (Unknown)	Schedule Impact	Yes (Unknown)
Drawing Number	Reference		
Linked Drawings			
Received From	Matt Berube (PALS)		
Copies To	Dave Adams (RGM Kramer, Inc.), Barton Copeland (Bobo Construction, Inc.), Margarita Diakou (Bobo Construction, Inc.), Jessie Elquist (RGM Kramer, Inc.), Christopher Gallup (River Delta Unified School District), Rachel Matsumoto (RGM Kramer, Inc.), Bonnie Williams (HKIT Architects), Ayana Toliver (RGM Kramer, Inc.), Erwin Won (HKIT Architects)		
Urgency	Urgent		

Activity

Question

Question from Margarita Diakou Bobo Construction, Inc. on Tuesday, Sep 19, 2023 at 03:16 PM PDT

We received the following from PALS:

We were on site today performing clean demo prior to starting the abatement tomorrow. We were pulling off wood paneling in the practice rooms and when we pulled off the wood paneling we discovered drywall concealed behind. We will need to extend the containment into these rooms and the hallway to remove the drywall concealed behind.

The condition is found in:

Rm113 two spots

Rm 114 two spots

Rm 115 two spots

Rm 116 one spot

Rm 120 music rm 3 spots

Please see attached and advise how you want us to track the additional cost, not included in PCO 006.1.

Thank you.

Attachments

[RFI 57.pdf](#)

Awaiting an Official Response

Proceed on a time and material basis. Notify CM and Hygienist at start and completion of work daily. Present tags for review and signature daily.
Dave Adams RGMK 9/21/23



**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: X

From: Tammy Busch, Asst. Supt. of Business

Item Number: 24

Type of item: (Action, Consent Action or Information Only): Action

SUBJECT:

Request to Approve the Agreement with Ubeo Business Services for File Conversion Services

BACKGROUND:

The district has multiple boxes and files that are permanent records and cannot be destroyed. Having these documents converted to digital files will make it more efficient when it is needed to research or pull a particular file. The district also received a quote from Wizix. It was hard to compare costs with not receiving a scope of work from this vendor. Ubeo provided a more comprehensive scope of work and a demonstration of the software district files will be retained.

STATUS:

Ubeo will work with Asst. Superintendent of Business Services, Director of Personnel, and other staff members to perform the scope or work outlined in the attachment.

PRESENTER:

Tammy Busch, Asst. Superintendent of Business Services

OTHER PEOPLE WHO MIGHT BE PRESENT:

COST AND FUNDING SOURCES:

\$285,685 from Unrestricted General Fund

RECOMMENDATION:

That the Board approves the Agreement with Ubeo Business Services for File Conversion Services in the amount of \$285,685.

Time allocated: 5 minutes



File Conversion Services Findings & Recommendations River Delta Unified School District

October 24, 2023



Prepared by Kristen Sparkes
ksparkes@ubeo.com
925-984-9256



Dear River Delta Unified School District,

We appreciate the opportunity to provide end-to-end professional services to digitize your critical **Files**. The details and specifications of this proposal are prepared to deliver the validation of our understanding of your project scope and financial estimate based on details provided in our conversations and assessment.

*A foundational principle at UBEO is to take care of our
Customers first, our Employees second, and our Company third.
Our success is proof that if you are committed to the first two, the third takes care of itself.*

We look forward to partnering with you and delivering value to your organization.

Sincerely your UBEO team,

Kristen Sparkes
Project Manager –Outsource Services
UBEO
925-984-9256
ksparkes@ubeo.com



Tamara Landa Becker
Account Manager
UBEO
209 969 3232
tlandabecker@ubeo.com



UBEO Company Information:

Ubeo Business Services is a full-service technology partner specializing in business workflow improvements and efficiency. Delivering and supporting full spectrum of technology from multifunctional copy/print/scan solutions, Managed IT services, Professional Electronic Content Management (ECM) software, print/mail solutions as well as high end production and wide format graphics systems.

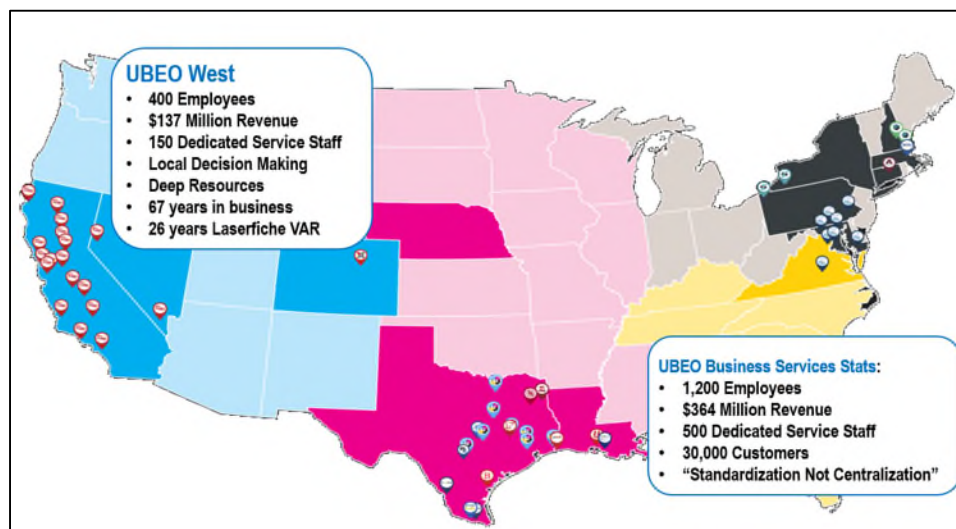
We have had tremendous success supporting over 35,000 clients with our corporate philosophy of customer first - employees second and company third. We continue to expand our managed services model & methodology to enhance our customers' experience and deliver ongoing value. This customer centric approach includes business process optimization, workplace services, and flexibility to deliver multi-faceted technology solutions and services.



UBEO Business Services provides complete end to end conversion services to convert media to digital. Our services support the preparation and scanning of millions of paper pages very efficiently through our teams of dedicated professionals. These services convert paper & other media types; microfiche, microfilm, bound lab books, textbooks, year books, periodicals, and wide format (to name a few) from current state to digital.

UBEO is experienced in delivering digital files, with metadata in a variety of formats specific to meet specific client's needs.

We have grown to \$500 million in annual revenues with 34 offices throughout North America. Headquartered in Chico, CA we have multiple offices, California - Texas and Colorado, and **CA Based Processing in both Pleasanton & Bakersfield.**





Conversion to Digital

Goals Shared by Client:

- Convert critical files in the District Office & in the Connex Boxes in parking lot.
- Reduce risk of damage
- Re-pave the car park to provide additional spaces & improved accessibility.
- Streamlining access in digital format
- Reduce physical storage space.
- Provide efficiency to team for access.

Assessment Framework:

On site assessment (9/13/2023). Kristen & Tamara met with RDUSD team and completed with physical walk through and had discussions with department champions file details and information.

Assessment included the review of physical structure of files, types of papers inside, sizes, paper weights along with goals for conversion. Project volumes: # of packed boxes & sizes along with cabinet measurements were gathered at on-site assessment.

Framework Estimate Includes:

Departments, location within office, file types for conversion, details of current file structure and goals for digital deliverable.

The goal of the framework is to share the findings from the assessment, UBEO's conversion processes, what you can anticipate in partnering with UBEO as well as a preliminary budget for the project.

Visuals from Assessment – Board Room



File types shared in the boardroom.

- Bond
- Funds
- Expenditures

Visuals from Assessment – Vault



File types shared in the Vault included:

- Board Binders
- Bond Files
- Payroll/CBO Files/Board/Expulsion
- Bond/Reconcile/Audits
- File cabinet contents - TBD

Visuals from Assessment – Human Resources

Inactive Files



Active Files



File Types Shared in HR – Active & Inactive



Visuals from Assessment – Closet



File types shared in the Closet are:
Businesses Binders, Funds Larger than 2001, Attendance, Contract Payroll
Vacation Leave



Connex 1 (Left as you look at the containers)



File types in Connex 1:
Cume Records, Categorical, payroll, employee certificates, benefits documents, sick leave, vacation...
Green bar grouped in boxes.



Connex 2 (Right side as you look at the containers)



File types in Connex 2:
Payroll, Vacation, Plastic wrapped green bar "Distribution Summaries."

Summary of Assessment

River Delta Unified School District has a plethora of important business files for conversion.

Some of the common types of paper found include:

Letter, legal, 11 X 17 and wide format flat & rolls.

Staples, binder clips, binders with tabs, green bar and manila folders are present.

Many of the files in the vault have combination of typed & handwritten file folder labels.

Binders are identifiable on the spine information.

Files in the HR area are well organized.

In the Connex boxes, the boxes are well labeled at the box level for file type and year.

! Much of the contents in the Connex boxes are older and contain fragile papers as well as great amount of tractor fed-continuous green bar files.

Based on the above findings, UBEO will recommend a combination of file level scanning (HR Files) and box level scanning with file separators for Payroll & Financial files.

UBEO will work with RDUSD to identify & group boxes by: Year, Department and File type to deliver a well-organized digital repository.

Overall Volume Assessment:

See PDF Overview....



VOLUME SUMMARY - River Delta Unified School District - VOLUME SUMMARY

Site Location	Department	File Types	Quantity of Drawers	Depth of Drawer in Inches	Quantity of Lateral Shelves	Width of Lateral Shelves	Qty. Standard Boxes	Qty. Oversized Box	Binders/wide format	Width of Binder?	Estimated Volume Accounts for 10% Double Sided	Estimated Standard Boxes Needed
Closet- Codi	HR Personnel	Inactive HR					74				183,150	74
Closet- Codi	HR Personnel	Rolodex Files							2	15	4,950	2
Codi Office	HR Personnel	Active HR - Live	4	35							23,100	9
Codi Office	HR Personnel	Active HR - Live	4	39							25,740	10
Codi Office	HR Legal	Legal Files	1	35							5,775	2
										HR Totals	242,715	98
Board Room	Maintenance/Bond	Bond	2	41							13,530	5
Board Room	Maintenance/Bond	Funds	1	41							6,765	3
Board Room	Maintenance/Bond	Expenditures	1	41							6,765	3
										Board Room Totals	27,060	11
Closet - Tammy	Business (Accounting)	Businesses Binders							65	3.5	37,538	15
Closet - Tammy	Business (Accounting)	Funds Larger than 2001					8				19,800	8
Closet - Tammy	Business (Accounting)	Attendance					5				12,375	5
Closet - Tammy	Business (Accounting)	Contract Payroll					6				14,850	6
Closet - Tammy	Business (Accounting)	Vacation Leave					7				17,325	7
										Closet Totals	101,888	41
Connex 1 - Left	Connex 1 Left	Permanent Records					143		12	4	361,845	146
Connex 1 - Left	Connex 1 Right	Permanent Records					188		12	4	473,220	191
Connex 1 - Left	Connex 1 Left	Green bar/Labor Distribution							138	4	91,080	37
										Connex 1 Totals	926,145	374
Connex 2 -Right	Connex 2 Left	Payroll/Categorical/Green bar/Daily Absence/payroll/Workers Comp/Binders in boxes/Sick leave/Certificated Payroll					114				282,150	114
Connex 2 -Right	Connex 2 Right	Permanent Records					51	3			141,075	57
										Connex 2 Totals	423,225	171
Vault	Various	Board Binders							10	4	6,600	3
Vault	Various	Bond Files			2	28					9,240	4
Vault	Various	Bond Files	4	27							17,820	7
Vault	Business (Various)	Payroll/CBO Files/Board/Expulsion					130	1			326,700	132
Vault	Business	Bond/Reconcile/Audits							51	3	25,245	10
										Vault Totals	385,605	156
										Standard Paper Total Estimates	2,106,638	851
Vault	Facilities	Maps Flat Boxes							23	0.25	863	0
Vault	Facilities	Wide Format							58	0.5	4,350	2
										Vault Wide Format	5,213	

Estimated Volume for conversion (based on counts & measurements) gathered during assessment.

Estimates based on Industry Standard assumptions of 150 papers per inch.

Standard Banker box @ 15 inches and generally accommodates 2,250 papers & Double 4,500 papers.

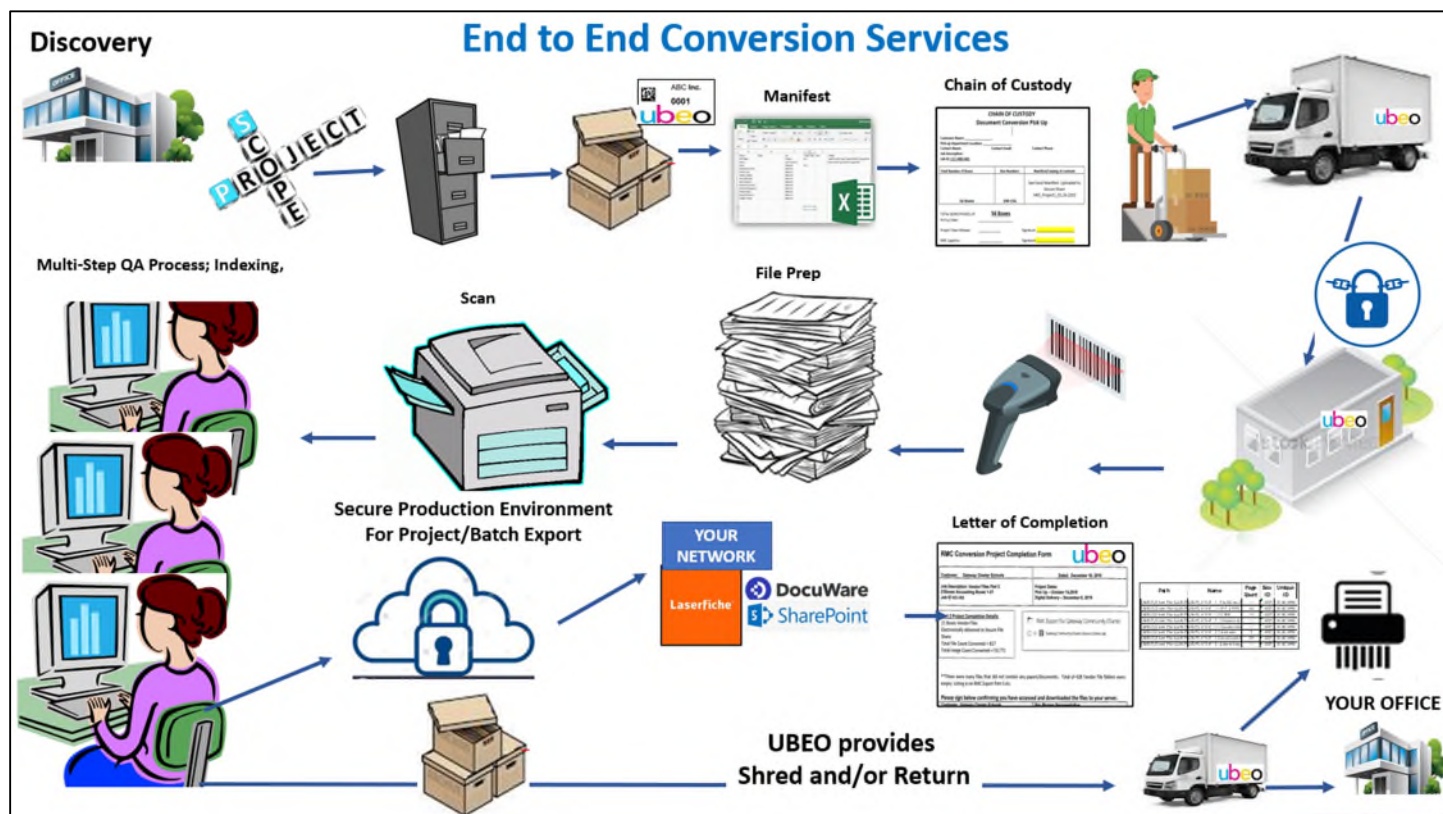
UBEO's Services:

UBEO provides professional services to convert your paper to digital.



UBEO General process for file conversion:

- UBEO will remove papers from boxes.
- UBEO will prepare all papers for scanning.
- UBEO will scan papers in order which they are presented in file.
- UBEO will place separator sheets between units of measure (File, Box, Binder)
- UBEO will name files per manifest and/or database.
- QC against physical
- UBEO will scan all files double sided and remove any blank pages & separator sheets from files.
- Provide read/rotation to ensure that all images are facing the correct direction for reading in an electronic file.
- Create (1) multipage file to include contents of *unit of measure (box, file, unit of measure)*.
- Digital delivery into secure portal for import into solution of choice



UBEO Services Include:

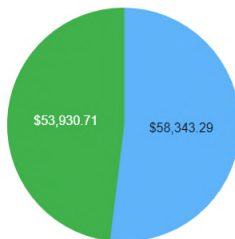
- Unique box labels specific to your project
- Project manager to work with your staff to recommend electronic manifest for box level & file level conversion.
- Chain of custody documents for box/file pick-ups.
- Completed file/document preparation: remove papers from bradded sections, remove staples, clips, move sticky notes, unfold edges...
- Document scanning to replicate the paper files & subfolders based on scope of work.
- **QC process:** Scanner monitors for double feeds & quality of scans They will digitally remove blank pages, ensure readability and overall accuracy. Index QC: documents are indexed/named per SOW and visually inspected. Quality levels are tracked by team members. QC from export – Number of files provided in manifest; number of files exported. If additional files are found and not on manifest, UBEO will add. UBEO will also notify clients if files are not found during scan process that are listed on manifest.
- Image naming: based on SOW agreed upon.
- UBEO will place the pages back in the respective files & folders, however not re clip, re-brad, or staple.
- **Access to images during the conversion process.** Client can assign specific personnel that may communicate to request file/documents should they be needed during the conversion. Protocol for requesting files. Protocol will be put in place in advance of file pick up. Requested files will be scanned and transferred to UBEO Secure file share for designated staff to access.
- **Secure import of images** UBEO will deliver the digital files to secure destination of choice.
- UBEO will provide a project plan to meet specific time frame goals.
- UBEO will provide completion form for each export to include Project Dates, Box #'s, File Count, Image Count, Shred Authorization and Export Report & Project Summary Sheet.
- UBEO will only bill for images processed: please note that if a physical document is double sided, that is 2 images and may not be taken into consideration in the volume estimates provided by the client.
- UBEO can store your documents for 45 days pre-shred and/or return.

Project tracking and weekly updates – UBEO utilizes Smartsheet’s for project status and overall visibility. UBEO will provide weekly updates to include department, volumes, process alignment, export totals and more. Visual *example* below... This will be customized for your project phases.

Additional value added resources for project milestones and Purchase Order Tracking

Project Phase	Received	Prepped	Scanned	QA'd	Indexing & PDF Creation	Delivered to ARCR	Files	Images	Status
TOTALS	140	140	140	140	140	140	1789	317,815	
Client Files: Boxes 1-40	40	40	40	40	40	40	565	91,032	Digitally Delivered/Comple
Client Files: Boxes 41-65	25	25	25	25	25	25	275	58,477	Digitally Delivered/Comple
Client Files: Boxes 66-100	35	35	35	35	35	35	459	78,218	Digitally Delivered/Comple
Client Files: Boxes 101-140	40	40	40	40	40	40	490	90,088	Digitally Delivered/Comple

Purchase Order Tracking



Manifest for pick up is required and needs to include the UBEO Box #'s:

Each **FILE/UNIT OF MEASURE** should be represented by a line item on a spreadsheet. This will provide reconciliation of files provided for conversion to digital deliverable and box location should you have any file requests during conversion.

***Manifest requirements will differ depending on the types of files and level of conversion...
UBEO will work with your team to discuss in advance of pack for simplicity.*

*Columns on excel should mirror the folder structure you wish to have in Laserfiche.
Box # will not be used in Laserfiche, for reconcile purposes only.*

Naming details can be added to a template in Laserfiche as well.

Example BOX level – Minimum Require for pick up – Accounting,

UBEO Box #	File Type/Department	Year	Box Details
RDUSD-0001	Payroll	2022	January - December
RDUSD -0002	Payroll	2023	January - December

Example FILE level – Minimum Require for pick up- Employee - Student

UBEO Box #	File Type	Last	First	EE ID
RDUSD -0003	Human Resources	Pitt	Brad	12345
RDUSD -0003	Human Resources	Hauser	Cole	10876
RDUSD -0003	Human Resources	Sparkes	Kristen	33009

Please prepare files in "Standard" Banker Boxes 15" x 12" x 10"

Place UBEO Label as pictured.



River Delta USD - Financial Estimate - 10.24.2023

****Estimates based estimated volumes gathered in assessment, structure of files and paper types****

Please note these are estimates of overall paper volume and financial estimates...

UBEO will invoice based on quantity of images and files converted along with any other ancillary items below...

Rio Vista Unified School District	Board Room	Vault	Human Resources	Closet	Connex 1	Connex 2	Wide Format (sheets)	Totals
Recommended Conversion Level	File	Binder/Box	File Level	Binder /Box	Box / Green bar set	Box / Green bar set	Plan/Set	
Estimated Paper Count	27,060	385,605	242,715	101,888	926,145	423,225	5,213	2,111,850
Estimated Packed Boxes	11	156	98	41	374	171	2 Large	853
Pallets for Pick Up	0.25	3.90	2.45	1.00	9.36	4.28	2	23
Complete Conversion & Shred	\$ 3,545	\$ 50,522	\$ 31,801	\$ 13,349	\$ 121,344	\$ 55,451	\$ 9,673	\$ 285,685

Project Assumptions:

- Work to be completed offsite at UBEO production center.
- Specific turnaround time from pick up to digital delivery determined by volume picked up per location.
- Double sided paper= 2 images. Volume for project estimated on paper volume.
- Services based on Piggyback Shasta Union HS Agreement # SUHSD R6-2020
- Invoice will reflect transactional items below (Estimates based on the below)
 - Standard bi-tonal Image (up to 11 X 17) @ \$.129 per paper image
 - Large format @ \$1.89 per sheet
- ***Additional items to be discussed and determined for final scope (not included in estimates above):***
 - Manual File naming (if no file level database or excel catalog is provided) @ \$.35 per file.
 - Color images @ \$.142 per paper images
 - File Barcode/separator sheets @ \$.079 each
 - Special Handling - Utilized when page(s) needs to be repaired, perforated/separated, or appended @ \$35 /hr.
 - Project Management \$200 per hour (Block time to be added to project @ 10 Hours).
- UBEO will provide PO tracking via Smartsheet's.
- UBEO will generate invoices per export phase against PO provided by client.
- Additional services can be requested and added via change order to scope of work.
- UBEO reserves the right to modify the pricing proposal should the scope of the project be modified.



Laserfiche Proposal

UBEO Contact: Tamara Landa Becker

Major Account Executive

209.969.3232 Mobile

tlandbecker@ubeo.com

Proposed Solution: Laserfiche

Modernize Your Enterprise

Laserfiche is the leading SaaS provider of enterprise content management (ECM) and process automation software. Through powerful workflows, electronic forms, intelligent analytics, and document/records management, Laserfiche helps thousands of organizations accelerate operations and drive business growth.

One Seamless Platform



Process Automation

Simplify and modernize your business processes, allowing teams to focus on high priority initiatives versus burdensome administrative tasks. Reduce repetitive tasks, accelerate approvals, and deliver results faster throughout your entire organization.

Document and Records Management

Keep your enterprise data safe with innovative lifecycle management tools, custom retention rules and secure sensitive document sharing. Improve collaboration and process management while maintaining access security at whatever level employees need.

Intelligent Data Capture

Unlock valuable information with capture tools that process high volumes of content, extract data and automatically organize files. Save time and reduce errors by capturing and classifying your data to make your content searchable from one centralized, organized location.

Integrations

Quickly integrate Laserfiche with your mission-critical enterprise applications with out-of-the-box integrations or iPaaS connectors, allowing Laserfiche to be the backbone for your enterprise content and data accuracy across hundreds of applications.

Solutions Marketplace

Prebuilt solution templates accelerate your return on investment without having to design a workflow from scratch. The Laserfiche Solution Marketplace is a free library of hundreds industry and department-specific templates, designed by fellow customers



Features

Laserfiche Cloud

- Laserfiche Cloud is enterprise content management with built-in business process management tools in a secure and scalable Software-as-a-Service (SaaS) subscription. It enables organizations to securely manage and share documents, emails and other content as they flow through organizational processes.
 - Provides recognized, industry-leading security with Amazon Web Services (AWS), file encryption.
 - Granular access controls to manage security rights from a user-friendly administrative console.

Content Capture

There are many options to capture content in Laserfiche Cloud:

- Laserfiche Scanning allows paper documents to be easily converted into convenient electronic records in Laserfiche.
- Laserfiche Snapshot allows users to quickly print an archival image version of any file type to Laserfiche.
- Drag-and-drop files from a computer and import them into a Laserfiche Cloud repository.
- Laserfiche Import Agent automatically uploads content from local storage as soon as it is detected as well as supports email archiving.
- Quick Fields provide advanced automated data capture sessions (available as an add-on).

Content Services

- Centralized document management
- Metadata - add tags to documents and folders.
- Check documents in and out.
- Search all content.
- Create, copy, move, rename, download and delete documents.
- Add documents to the Laserfiche repository from other apps.
- Records Management.



Pricing & Next Steps

Ubeo Business Services is proud to be considered as a digital solutions provider for your business process and workflow needs. You will be assigned a Pre-Sales Solutions Consultant, Implementation ECM Engineer, Project Coordinator, and a National Software Solutions Consultant to assist you through the process.

Central Repository Solution

Laserfiche Software

10 **Annual Cloud** Full-User Licenses (\$830.00 each) \$8,300.00

20 Professional Service Hours for Software Installation (\$225.00 each) \$4,500.00 (One-Time)

TOTAL: \$12,800.00

Post support with UBEO Pro-IT 10 Hours @ \$225

Project Includes:

Discovery to define document management process

Project scope documentation

Software installation

Software configuration

Standard phone support M-F 8am-5pm

Tailored Quick Start guide for basic document indexing and filing

Dedicated remote support representative for first 60 days

Installation Procedures & Expectations:

Step 1: Sign Sales Order to move forward with an ECM Solution

Step 2: Ubeo ProIT will finalize the Discovery Process and Statement of Work

Step 3: Installation - Develop the forms, workflows and automated document storage.

Step 4: Training - We will train during the installation process and follow-up training as needed.

Step 5: Support - Ongoing.



Next Steps & Project Timetables:

Take to board in December for approval. 2nd Tuesday of month.

UBEO to follow up on 12/13 for updates and next steps.

If approved, project kick off January 2024 – project plan, priorities, timetables.

Inactive HR

Active HR

Expulsions

Board Agendas

Bonds

Payroll

Business

Maps

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 94571-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: 1

From: Tammy Busch, Asst. Superintendent of Business Service

Item Number: 25

Type of item: (Action, Consent Action or Information Only): Action

SUBJECT:

Request to Approve the Delta High School/Clarksburg Middle School Septic System Replacement - Geotech Engineering Proposal

BACKGROUND:

During the construction of the Delta HS/Clarksburg MS Cafeteria Modernization it was discovered that tree roots damaged the existing septic system and it is in need of replacement. This work impacts the completion of the cafeteria project in a timely manner.

On the November 14, 2023 Board meeting the Board approved a contract with Gomes Excavating to install a new septic tank, distribution lines, cleanouts, concrete distribution boxes, perforated leach line and permitting as required by the county.

STATUS:

Yolo County requires a soils report as part of the permitting process. RGMK has obtained a proposal from a geotechnical engineer to perform infiltration samples and provide a soils report as required by Yolo County for permitting.

PRESENTER:

Tammy Busch, Asst. Superintendent of Business Service and Katherine Wright, Superintendent

OTHER PEOPLE WHO MIGHT BE PRESENT:

Maria Denney and Ralph Caputo, RGM Kramer

COST AND FUNDING SOURCES:

Measure K not to exceed \$5,000.

RECOMMENDATION: Staff recommends:

1. The Board approve the attached proposal from Universal in the amount of \$5,000.
2. The Superintendent or designee be authorized to approve additional miscellaneous expenses in accordance with existing Board policy as may be required to complete the project.

Attachments: Universal proposal

Time allocated: 2 minutes

December 4, 2023

River Delta Unified School District
Tammy Busch
Assistant Superintendent of Business Services
445 Montezuma Street
Rio Vista, California 94571

Geotechnical Engineering Services – Proposal

Delta High school Septic System

Clarksburg, California
UES Proposal No. 4630.1123.00003

As requested, we are pleased to submit this proposal to provide geotechnical engineering consultation services for the proposed improvement for Delta High school at 52810 Netherlands Road in Clarksburg, California. To assist with the preparation of this proposal, we have discussed the project with you; we have reviewed the project schematic plan prepared by Warren E. Gomes Excavating, Inc.; and we have reviewed our files for previous geotechnical studies performed at and near the property.

Proposed Development

We understand that one of the septic tanks of the Delta High School’s kitchen is damaged and to be replaced. The septic system will the kitchen and staff bathroom and includes a 1500 gallon septic tank, four concrete distribution boxes and four 120-foot 4-inch perforated leach lines.

Historical Review and Previous Experience

In preparation of this proposal we reviewed reports of the following projects performed at or near the proposed improvements:

- Geologic and Geotechnical Engineering Report (Wallace-Kuhl & Associates [WKA] No. 6758.01, dated October 3, 2005) performed for Delta High School Improvements.
- Geotechnical Engineering Report (WKA no. 6758.04, dated December 15, 2008) performed for Delta High School Agriculture Technology Building Additions.
- Geotechnical Engineering Report (WKA no. 6853.02, dated April 10, 2009) performed for Clarksburg Community Church Expansion, located 500 feet east of the proposed development.

Purpose and Scope of Services

Based on our correspondence with you, we understand that feasibility study is required to evaluate the infiltration potential of the onsite soils at the subject property for the proposed leach line septic system.

We propose to perform two infiltration feasibility tests at approximately 5 feet below the existing ground surface. After excavating the borings to approximately 12 inches below the proposed elevation of the infiltration system, we will install a 2-inch-diameter perforated PVC pipe, pre-soak the test holes and perform the percolation testing. Immediately upon completion of the percolation testing, the holes will be backfilled with soil from cuttings.

Fee Estimate

We can prepare the report described above for an estimated fee of **\$5,000**. We would not exceed this fee estimate unless the field explorations uncover conditions requiring additional study, site access issues arise which delays the field crew, or if our scope of services is revised, and only after receiving authorization from your office for additional work. Final billing would be in accordance with the attached schedule of fees for the actual work accomplished.

Please note, the above fee does not include costs associated with review of the project plans or specifications, environmental testing, or testing and observation services required during construction. Costs for these services can be provided upon request.

Schedule

We anticipate that project planning and scheduling can begin within one to two days of receiving written authorization to proceed. The infiltration testing would be scheduled within one week of receiving written authorization to proceed, as well as depending on availability which should take 1 day to complete. The final report can be completed within one week following completion of the laboratory testing.

Project Assumptions

Our services are based on the following assumptions. If any ultimate facts or events differ from such assumptions, our services, schedule, and compensation may need to be adjusted, if necessary.

- Your office will provide contact information regarding site access for the field explorations.
- The field work can be performed during normal business hours, excluding weekends and holidays.
- The site is accessible for UES personnel
- We have assumed that contaminated soils would not be encountered at the site and the excess drilling spoils can be spread on site. Costs to drum, characterize, transport, and dispose of drummed waste are not included within our scope.
- We have assumed that this project is subject to prevailing wage laws. If this is not the case, please notify me so that the budget can be adjusted accordingly.

Agreement

Our agreement for this work is attached to this proposal. If this proposal is acceptable, please sign the agreement and return it to us as our written authorization to proceed. We will return a fully executed copy of the agreement to you for your files. Please inform us if wet-signed copies of the agreement are required. If that is the case, please print sign and return two copies of the agreement to our office. We will then return a fully executed copy by US mail for your files. This proposal is valid for 60 days from the date shown above.

We appreciate the opportunity to submit this proposal and look forward to the possibility of providing you with our services. If you have any questions concerning this proposal or work scope, please contact us at (916) 372-1434.

Universal Engineering Sciences (UES)



Rouzbeh Afshar, Ph.D., P.E.

Principal Engineer

Attachments

- Agreement for Geotechnical Engineering Services
- Schedule of Fees 2023 – Prevailing Wage



FIELD SERVICES

SOILS & ASPHALT

ICC Certified Soils Inspector	\$ 135.00 /hr.
Soils / Asphalt Technician	\$ 130.00 /hr.
Earthwork and Grading	\$ 130.00 /hr.
Excavation Backfill	\$ 130.00 /hr.
Sample Pick-up	\$ 120.00 /hr.

CONCRETE & REINFORCING STEEL

ACI Concrete Technician	\$ 125.00 /hr.
ICC Certified Structural Inspector	\$ 140.00 /hr.
DSA Shotcrete Inspection	\$ 150.00 /hr.
Sample Pick-up / Cylinder Pick-up	\$ 120.00 /hr.

POST-INSTALLED ANCHORS

Concrete Anchor Installation Inspection	\$ 125.00 /hr.
Concrete Anchor Proof Load Testing	\$ 125.00 /hr.
Concrete Anchor Torque Testing	\$ 125.00 /hr.
Suspended Ceiling Inspection / Testing	\$ 125.00 /hr.

OTHER SERVICES

Coring	\$ 150.00 /hr.
Firestopping Inspection	\$ 140.00 /hr.
Glulam / Truss Fabrication (Shop)	\$ 140.00 /hr.
Glulam / Timber in Structure	\$ 155.00 /hr.
Megger Ground Testing	\$ 155.00 /hr.
Wood Framing & Shear Wall	\$ 140.00 /hr.
Roofing Membrane	\$ 125.00 /hr.
Crack Monitoring	**
Vibration Monitoring	**

MASONRY

ACI Concrete Technician	\$ 125.00 /hr.
ICC Certified Structural Inspector	\$ 140.00 /hr.
Masonry Special Inspection DSA Cert.	\$ 150.00 /hr.
Sample Pick-up	\$ 120.00 /hr.

STRUCTURAL STEEL

AWS / CWI	\$ 145.00 /hr.
NDT LEVEL 2 UT / MT / PT	\$ 150.00 /hr.
ICC Certified Structural Inspector	\$ 140.00 /hr.

FIELD INVESTIGATION TESTING

Seismic Refraction Survey	\$ 215.00 /hr.
Thermal Resistivity Testing	\$ 215.00 /hr.
Electrical Resistivity Survey	\$ 215.00 /hr.
Photoionization Detector	\$ 220.00 /hr.

PROFESSIONAL SERVICES

Principal Engineer / Geologist	\$ 225.00 /hr.
Senior Engineer / Geologist	\$ 220.00 /hr.
Project Engineer / Geologist	\$ 180.00 /hr.
Staff Engineer / Geologist	\$ 155.00 /hr.
QC Manager	\$ 160.00 /hr.
Project Manager	\$ 160.00 /hr.
Expert Witness	\$ 475.00 /hr.
Project Administrator	\$ 95.00 /hr.

GENERAL

Per Diem / Lodging	Cost plus 20%
Subcontractors	Cost plus 20%
Equipment rental	Cost plus 20%
Overtime and Saturdays	1.5x hourly rate
Sunday and Holidays, and over 8 hrs. on Saturday	2x hourly rate
Expedited / Rush Charge (Less than 24 hours notice)	1.5x hourly rate
Stand-By Time	* see below
Cancellation	* see below
Reinspection / Retesting	* see below

SHIFT DIFFERENTIAL

Shift differential surcharge will be added to the hourly rate of personnel involved in scheduled inspection or testing work between the hours of 9 P.M. and 5 A.M. 1.5x hourly rate

* Based on hourly rate of Inspection or Testing scheduled

** Based on Staff Classification

MINIMUM CHARGES

- All field services are billed portal to portal.
- Field services are billed in 4-hour and 8-hour increments.



LABORATORY SERVICES

SOIL

Atterberg Limits (LL/PI) - Wet Method	ASTM D4318	\$ 185.00	each
Soil Cement Compression Test	ASTM D4832	\$ 130.00	each
Standard Proctor	ASTM D698	\$ 300.00	each
Modified Proctor	ASTM D1557	\$ 350.00	each
Proctor	CTM 216	\$ 350.00	each
Consolidation (8 loads + 1 rebound)	ASTM D2435	\$ 560.00	each
Expansion Index	ASTM D4829	\$ 225.00	each
Hydraulic Conductivity, Flexible Wall Permeability	ASTM D5084	\$ 600.00	each
Lime - Treated Unconfined Compression	CTM 373	\$ 895.00	each
Organic Content	ASTM D2974	\$ 115.00	each
Hydrometer	ASTM D7928	\$ 195.00	each
Sieve Analysis	ASTM D6913	\$ 150.00	each
Resistance "R" Value	ASTM D2844, CTM 301	\$ 450.00	each
Sieve Analysis - Passing No. 200 only	ASTM D1140	\$ 110.00	each
Specific Gravity of Soils	ASTM D854	\$ 180.00	each
Thermal Resistivity	ASTM D5334	\$ 90.00	each
Triaxial Compression Test - U/U	ASTM D4767	\$ 300.00	each
Triaxial Compression Test - C/U	ASTM D4767	\$ 480.00	point
Unconfined Compression Test	ASTM D2166	\$ 130.00	each
Unit Weight / Moisture Content - Tube Sample	ASTM D2937 / D2216	\$ 48.00	each

AGGREGATE

Aggregate Unit Weight	ASTM C29	\$ 70.00	each
Clay Lumps and Friable Particles	ASTM C142	\$ 180.00	per size
Cleanness Value	CTM 227	\$ 195.00	each
Unit Weight Correction	ASTM D4718	\$ 135.00	each
Durability Index (Coarse or Fine)	CTM 229	\$ 190.00	each
Flat and Elongated Particles in Coarse Aggregate	ASTM D4791	\$ 140.00	per size
Fractured / Crushed Particles	ASTM D5821, CTM 205, AASHTO T335	\$ 140.00	per size
Organic Impurities in Fine Aggregates	ASTM C40	\$ 75.00	each
Resistance "R" Value - Aggregate	CTM 301	\$ 450.00	each
Sand Equivalent	CTM 217, AASHTO T176	\$ 160.00	each
Sieve Analysis - Coarse or Fine	ASTM C136, CTM 202, AASHTO T27	\$ 130.00	each
Sieve Analysis - Passing No. 200 only	ASTM C117, AASHTO T11	\$ 110.00	each
Sodium Sulfate Soundness	ASTM C88, CTM 214	\$ 190.00	per size
Specific Gravity and Absorption (Coarse or Fine)	ASTM C127, C128	\$ 145.00	each
LA Abrasion	ASTM C131, AASHTO T96, CTM 211	\$ 350.00	each

ASPHALT

Asphalt Content (Ignition Oven)	CTM 382, AASHTO T308	\$ 300.00	each
Asphalt Content Correction Factor	CTM 382, AASHTO T308	\$ 590.00	each
Hveem Compaction, Unit Weight, and Stability	ASTM D1560 / D2726, CTM 304 / 308, AASHTO T166	\$ 385.00	set of 3
Laboratory Test Maximum Density (LTMD)	CTM 375	\$ 405.00	each
Moisture Content of Asphalt Mixtures	CTM 370, AASHTO T329	\$ 90.00	each
Theoretical Maximum Density	ASTM D2041, CTM 309, AASHTO T209	\$ 190.00	each
Thickness of AC Cores	ASTM D3549	\$ 30.00	each
Unit Weight of AC Cores	CTM 308, AASHTO T166 / T275	\$ 75.00	each

**SCHEDULE OF FEES 2023P**

Page 3 of 3

LABORATORY SERVICES**CONCRETE**

Compression Test, Concrete Cylinder	ASTM C39	\$ 30.00	each
Compression Test, Concrete Core	ASTM C42, C39	\$ 90.00	each
Compression Test, Shotcrete Core	ASTM C42, C39	\$ 150.00	each
Compression Test	ASTM C1107 / C109	\$ 50.00	each
Density / Unit Weight of Concrete	ASTM C567, C642	\$ 120.00	each
Flexural Strength Test, Concrete Beam	ASTM C78	\$ 135.00	each
Laboratory Drying Shrinkage Test	ASTM C157, AASHTO T160	\$ 240.00	each
Controlled Low Strength Material (CLSM)	ASTM D4832	\$ 130.00	each

MASONRY

Brick			
Compression Test	ASTM C67	\$ 85.00	each
Absorption	ASTM C67	\$ 100.00	each
Concrete Masonry Unit			
Compression Test	ASTM C140	\$ 100.00	each
Absorption & Moisture Content	ASTM C140	\$ 100.00	each
Linear Drying Shrinkage	ASTM C426	\$ 250.00	each
Compression Test, Composite Masonry Prism	ASTM C1314	\$ 170.00	each
Compression Test, Masonry Grout	ASTM C1019	\$ 75.00	each
Core Shear Test	CBC Section 2105A	\$ 250.00	each

STEEL

Anchor Bolt Tensile Test	ASTM F606	\$ 200.00	each
Fireproofing Density Test	ASTM E605	\$ 115.00	each
High Strength Bolt Assembly Laboratory Testing	ASTM F606, E18	\$ 500.00	assembly
Tendon Tensile Test	ASTM A416 / A1061	\$ 420.00	each
Reinforcing Steel (Rebar) Tensile Test	ASTM A615, A706 / A370	\$ 130.00	each
Reinforcing Steel (Rebar) Bend Test - Up to No. 8	ASTM A615, A706 / A370	\$ 55.00	each
Structural Steel Tensile Test	ASTM A370	\$ 125.00	each
Machining of Test Specimens		Cost plus 20%	
Structural Steel Hardness Test	ASTM E18	\$ 90.00	each



**GEOTECHNICAL ENGINEERING
SERVICES AGREEMENT**

THIS AGREEMENT, effective as of July 28, 2023, is by and between **River Delta USD** (“Client”) and **River City Geoprosessionals, Inc., dba Universal Engineering Sciences** (“UES”).

THE PROJECT: **Delta High School Septic System**

THE PROJECT is generally described as: geotechnical engineering consultation services for the proposed four-plex to be constructed at Delta High School in Clarksburg, California. (“Project Site”).

THIS AGREEMENT consists of the following documents which are incorporated herein by reference:

- General Conditions for Geotechnical Engineering Services;
- **UES’s** Scope of Services Letter (UES Proposal No. 4630.1123.00003); and,
- **UES’s** Schedule of Fees (Exhibit A).

UES agrees to perform the Services set forth in this Agreement and in accordance with its terms, including all attachments incorporated herein by reference. This Agreement may not be modified or altered, except in writing as specifically described in this Agreement.

	<u>CLIENT:</u>	<u>UES:</u>
Signature:	_____	<u><i>Rouzbeh Afshar</i></u>
Print Name:	_____	<u>Rouzbeh Afshar, PE</u>
Title:	_____	<u>Principal Engineer</u>
Company:	_____	<u>River City Geoprosessionals, Inc., dba Universal Engineering Sciences (UES)</u>
Address:	_____	<u>3050 Industrial Boulevard</u>
	_____	<u>West Sacramento, California 95691</u>
Date:	_____	<u>12/4/2023</u>



GENERAL CONDITIONS FOR GEOTECHNICAL ENGINEERING SERVICES

1. DEFINITIONS

1.1. Contract Documents. Plans, specifications, and agreements between Client and Contractors, including addenda, amendments, supplementary instructions, and change orders.

1.2. Contractor. The contractor or contractors retained to construct the Project for which **Universal Engineering Sciences (UES)** is providing Services under this Agreement.

1.3. Day(s). Calendar day(s) unless otherwise stated.

1.4. Hazardous Materials. The term Hazardous Materials means any toxic substances, chemicals, radioactivity, pollutants or other materials, in whatever form or state, known or suspected to impair the environment in any way whatsoever. Hazardous Materials include, but are not limited to, those substances defined, designated or listed in any federal, state or local law, regulation or ordinance concerning hazardous wastes, toxic substances or pollution.

1.5. Services. The Services provided by **UES** as set forth in this Agreement, the SCOPE OF SERVICES and any written amendment to this Agreement.

1.6. Work. The labor, materials, equipment and services required to complete the work described in the Contract Documents.

2. SCOPE OF SERVICES

UES will perform the Services set forth in the attached SCOPE OF SERVICES.

2.1. Changes in Scope. If **UES** provides Client with a writing confirming a change in the SCOPE OF SERVICES, it will become an amendment to this Agreement unless Client objects in writing within 5 business days after receipt. All Services performed by **UES** on the Project are subject to the terms and limitations of this Agreement. If Services are performed, but the parties do not reach agreement concerning modifications to the SCOPE OF SERVICES or compensation, then the terms and limitations of this Agreement apply to such Services, except for the payment terms. The parties agree to resolve disputes concerning modifications to scope or compensation pursuant to Section 19, "Disputes."

2.2. Licenses. **UES** will procure and maintain business and professional licenses and registrations necessary to provide its Services.

2.3. Excluded Services. **UES's** Services under this Agreement include only those Services specified in the SCOPE OF SERVICES.

2.3.1. General. Client expressly waives any claim against **UES** resulting from its failure to perform recommended additional Services that Client has not authorized **UES** to perform, and any claim that **UES** failed to perform services that Client instructs **UES** not to perform.

2.3.2. Biological Pollutants. **UES's** SCOPE OF SERVICES specifically excludes the investigation, detection, prevention or assessment of the presence of Biological Pollutants. The term "Biological Pollutants" includes, but is not limited to, molds, fungi, spores, bacteria, viruses, and/or any of their byproducts. **UES's** SCOPE OF SERVICES will not include any interpretations, recommendations, findings, or conclusions pertaining to Biological Pollutants. Client agrees that **UES** has no liability for any claims alleging a failure to investigate, detect, prevent, assess, or make recommendations for preventing, controlling or abating Biological Pollutants. Furthermore, Client agrees to defend, indemnify, and hold harmless **UES** from all claims by any third party concerning Biological Pollutants, except for damages caused by **UES's** sole negligence.

3. PAYMENTS TO UES

3.1. Basic Services. **UES** will perform all Services set forth in the attached SCOPE OF SERVICES AND SCHEDULE OF FEES for the amount(s) set forth therein.

3.2. Additional Services. Any Services performed under this Agreement, except those Services expressly identified in the attached SCOPE OF SERVICES, will be provided on a time and materials basis unless otherwise specifically agreed to in writing by both parties.

3.3. Estimate of Fees. **UES** will, to the best of its ability, perform the Services and accomplish the objectives defined in this Agreement within any written cost estimate provided by **UES**. Client recognizes that changes in scope and schedule, and unforeseen circumstances can all influence the successful completion of Services within the estimated cost. The use of an estimate of fees or of a "not to exceed" limitation is not a guarantee that the Services will be completed for that amount; rather, it indicates that **UES** shall not incur fees and expenses in excess of the estimate or limitation amount without obtaining Client's agreement to do so.

3.4. Rates. Client will pay **UES** at the rates set forth in the attached SCHEDULE OF FEES.

3.4.1. Changes to Rates. Client and **UES** agree that the SCHEDULE OF FEES is subject to periodic review and amendment, as appropriate to reflect **UES's** then-current fee structure. **UES** will give Client at least 30 days advance notice of any changes. Unless Client objects in writing to the proposed amended fee structure within 30 days of notification, the amended fee



structure will be incorporated into this Agreement and will then supersede any prior fee structure. If Client timely objects to the amended fee structure, and UES and Client cannot agree upon a new fee structure within 30 days after notice, UES may terminate this Agreement and be compensated as set forth under Section 18, "Termination."

3.4.2. Prevailing Wages. Unless Client specifically informs UES in writing that prevailing wage regulations cover the Project and the SCOPE OF SERVICES identifies it as covered by such regulations, Client will reimburse, defend, indemnify and hold harmless UES from and against any liability resulting from a subsequent determination that prevailing wage regulations cover the Project, including all costs, fines and attorneys' fees.

3.5. Payment Timing; Late Charge. All invoices are due upon receipt. All amounts unpaid 30 days after the invoice date will include a late payment charge from the date of the invoice, at the rate of 1-1/2% per month or the highest rate permitted by law. If the Client is an LLC or LLP, the person signing this agreement shall be personally responsible for payment of all invoices and late fees.

4. STANDARD OF PERFORMANCE; DISCLAIMER OF WARRANTIES

4.1. Level of Service. UES offers different levels of Geotechnical Engineering Services to suit the desires and needs of different clients. Although the possibility of error can never be eliminated, more detailed and extensive Services yield more information and reduce the probability of error, but at increased cost. Client must determine the level of Services adequate for its purposes. Client has reviewed the SCOPE OF SERVICES and has determined that it does not need or want a greater level of Services than that being provided.

4.2. Standard of Care. Subject to the limitations inherent in the agreed SCOPE OF SERVICES as to the degree of care, the amount of time and expenses to be incurred, and subject to any other limitations contained in this Agreement, UES will perform its Services consistent with that level of care and skill ordinarily exercised by other professional engineers practicing in the same locale and under similar circumstances at the time the Services are performed.

4.3. No Warranty. No warranty, either express or implied, is included or intended by this Agreement.

5. ESTIMATE OF CONSTRUCTION COSTS

Client acknowledges that construction and Project development are subject to many influences that are not subject to precise forecasting and are outside of UES's control. Client further acknowledges that actual costs incurred may vary substantially from the estimates prepared by UES and that UES does not warrant or guaranty the accuracy of construction or development cost estimates.

6. CONSTRUCTION PHASE SERVICES

If UES's SCOPE OF SERVICES includes observation and/or testing during the course of construction, UES may:

6.1. Construction Observation.

6.1.1. Site Meetings & Visits. UES will participate in job site meetings as requested by Client or Client's designated representative, and, unless otherwise requested by Client, visit the site at times specified in the SCOPE OF SERVICES or, if not specified in the SCOPE OF SERVICES, at intervals as UES deems appropriate to the various stages of construction to observe the geotechnical conditions encountered by Contractor and the progress and quality of the geotechnical aspects of the Work. Based on information obtained during such visits and on such observations, UES may inform Client of the progress of the geotechnical aspects of the Work. Client understands that UES may not be on site continuously; and, unless expressly agreed otherwise, UES will not observe all of the Work.

6.1.2. Contractor's Performance. UES does not, and cannot, warrant or guarantee that all of the geotechnical Work performed by Contractor meets the requirements of UES's geotechnical recommendations or the plans and specifications for such geotechnical Work; nor can UES be responsible for Contractor's failure to perform the Work in accordance with the plans, specifications or the recommendations of UES.

6.1.3. Contractor's Responsibilities. UES will not supervise, direct or have control over the Work nor will UES have authority over or responsibility for the means, methods, techniques, sequences or procedures of construction selected by Contractor for the geotechnical aspects of the Project; for safety precautions and programs incident to the Work; nor for any failure of Contractor to comply with Laws and Regulations applicable to Contractor furnishing and performing its Work.

6.1.4. Final Report. At the conclusion of Construction Phase Services, UES will provide Client with a written report summarizing the tests and observations, if any, made by UES.

6.2. Review of Contractor's Submittals. If included in the SCOPE OF WORK, UES will review and take appropriate action on the Contractor's submittals, such as shop drawings, product data, samples, and other required submittals. UES will review such submittals solely for general conformance with UES's design, and will not include review for the following, all of which will remain the responsibility of the Contractor: accuracy or completeness of details, quantities or dimensions; construction means, methods, sequences or procedures; coordination among trades; or construction safety.

6.3. Tests. Tests performed by UES on finished Work or Work in progress are taken intermittently and indicate the general acceptability of the Work on a statistical basis. UES's tests and observations of the Work are not a guarantee of the quality of Work and do not relieve other parties from their responsibility to perform their Work in accordance with applicable plans, specifications and requirements.



7. CLIENT'S RESPONSIBILITIES

In addition to payment for the Services performed under this Agreement, Client agrees to:

7.1. Cooperation. Assist and cooperate with UES in any manner necessary and within its ability to facilitate UES's performance under this Agreement.

7.2. Representative. Designate a representative with authority to receive all notices and information pertaining to this Agreement, communicate Client's policies and decisions, and assist as necessary in matters pertaining to the Project and this Agreement. Client's representative will be subject to change by written notice.

7.3. Rights of Entry. Provide access to and/or obtain permission for UES to enter upon all property, whether or not owned by Client, as required to perform and complete the Services. UES will operate with reasonable care to minimize damage to the Project Site(s). However, Client recognizes that UES's operations and the use of investigative equipment may unavoidably alter conditions or affect the environment at the existing Project Site(s). The cost of repairing such damage will be borne by Client and is not included in the fee unless otherwise stated.

7.4. Relevant Information. Supply UES with all information and documents in Client's possession or knowledge which are relevant to UES's Services. Client warrants the accuracy of any information supplied by it to UES and acknowledges that UES is entitled to rely upon such information without verifying its accuracy. Prior to the commencement of any Services in connection with a specific property, Client will notify UES of any known potential or possible health or safety hazard existing on or near the Project Site, with particular reference to Hazardous Materials or conditions.

7.5. Subsurface Structures. Correctly designate on plans to be furnished to UES, the location of all subsurface structures, such as pipes, tanks, cables and utilities within the property lines of the Project Site(s) and be responsible for any damage inadvertently caused by UES to any such structure or utility not so designated. UES is not liable to Client for any losses, damages or claims arising from damage to subterranean structures or utilities that were not correctly shown on plans furnished by Client to UES.

8. CHANGED CONDITIONS

If UES discovers conditions or circumstances that it had not contemplated at the commencement of this Agreement ("Changed Conditions"), UES will notify Client in writing of the Changed Conditions. Client and UES agree to that they will then renegotiate in good faith the terms and conditions of this Agreement. If UES and Client cannot agree upon amended terms and conditions within 30 days after notice, UES may terminate this Agreement and be compensated as set forth in Section 18, "Termination."

9. HAZARDOUS MATERIALS

Client understands that UES's Services under this Agreement are limited to geotechnical engineering and that UES has no responsibility to locate, identify, evaluate, treat or otherwise consider or deal with Hazardous Materials. Client is solely responsible for notifying all appropriate federal, state, municipal or other governmental agencies, including the potentially affected public, of the existence of any Hazardous Materials located on or in the Project site, or located during the performance of this Agreement. The existence or discovery of Hazardous Materials constitutes a Changed Condition under this Agreement.

10. CERTIFICATIONS

Client agrees not to require that UES execute any certification with regard to Services performed or Work tested and/or observed under this Agreement unless: 1) UES believes that it has performed sufficient Services to provide a sufficient basis to issue the certification; 2) UES believes that the Services performed or Work tested and/or observed meet the criteria of the certification; and 3) UES has reviewed and approved in writing the exact form of such certification prior to execution of this Agreement. Any certification by UES is limited to an expression of professional opinion based upon the Services performed by UES, and does not constitute a warranty or guaranty, either express or implied.

11. ALLOCATION OF RISK

11.1. Limitation of Liability. The total cumulative liability of UES, its subconsultants and subcontractors, and all of their respective shareholders, directors, officers, employees and agents (collectively "UES Entities"), to Client arising from Services under this Agreement, including attorney's fees due under this Agreement, will not exceed the gross compensation received by UES under this Agreement or \$50,000, whichever is greater; provided, however, that such liability is further limited as described below. This limitation applies to all lawsuits, claims or actions that allege errors or omissions in UES's Services, whether alleged to arise in tort, contract, warranty, or other legal theory. Upon Client's written request, UES and Client may agree to increase the limitation to a greater amount in exchange for a negotiated increase in UES's fee, provided that they amend this Agreement in writing as provided in Section 20.

11.2. Indemnification.

11.2.1. Indemnification of Client. Subject to the provisions and limitations of this Agreement, UES agrees to indemnify and hold harmless Client, its shareholders, officers, directors, and employees from and against any and all claims, suits, liabilities, damages, expenses (including reasonable attorney's fees and costs of defense), or other losses (collectively "Losses") to the extent caused by UES's negligent performance of its Services under this Agreement and proportionate the degree of fault of UES. Notwithstanding the



foregoing, **UES** has no immediate obligation to provide the defense of any indemnified party for claims, suits, liabilities, damages, expenses alleged to have been caused by the negligent performance of professional services performed by **UES**. **UES** agrees to reimburse indemnified parties their reasonable cost of defense ultimately determined by an arbiter or Court of competent jurisdiction to have been caused by **UES's** negligent performance of professional services and proportionate to **UES's** fault.

11.2.2. Indemnification of UES. Client will indemnify and hold harmless **UES Entities** from and against any and all Losses to the extent caused by the negligence of Client, its employees, agents and contractors. In addition, except to the extent caused by **UES's** sole negligence, Client expressly agrees to defend, indemnify and hold harmless **UES Entities** from and against any and all Losses arising from or related to the existence, disposal, release, discharge, treatment or transportation of Hazardous Materials, or the exposure of any person to Hazardous Materials, or the degradation of the environment due to the presence, discharge, disposal, release of or exposure to Hazardous Material.

11.3. Consequential Damages. Neither Client nor **UES** will be liable to the other for any special, consequential, incidental or penal losses or damages including but not limited to losses, damages or claims related to the unavailability of property or facilities, shutdowns or service interruptions, loss of use, profits, revenue, or inventory, or for use charges, cost of capital, or claims of the other party and/or its customers.

11.4. Continuing Agreement. The indemnity obligations and the limitations of liability established under this Agreement will survive the expiration or termination of this Agreement. If **UES** provides Services to Client that the parties do not confirm through execution of an amendment to this Agreement, the obligations of the parties to indemnify each other and the limitations on liability established under this Agreement apply to such Services as if the parties had executed an amendment.

12. INSURANCE

12.1. UES's Insurance. **UES** will obtain, if reasonably available, the following coverages:

12.1.1. Statutory Workers' Compensation/Employer's Liability Insurance;

12.1.2. Commercial General Liability Insurance with a combined single limit of \$1,000,000 per occurrence and \$2,000,000 annual aggregate;

12.1.3. Automobile Liability Insurance, including liability for all owned, hired and non-owned vehicles with minimum limits of \$1,000,000 for bodily injury per person, \$1,000,000 property damage, and \$1,000,000 combined single limit per occurrence; and,

12.1.4. Professional Liability Insurance in amounts of \$2,000,000 per claim and annual aggregate.

12.2. Contractor's Insurance. Client shall require that all Contractors and subcontractors for the Project name **UES** as an additional insured under their General Liability and Automobile Liability insurance policies. If Client is not the Project owner, Client will require the Project owner to require the owner's Contractor to purchase and maintain General Liability, Builder's Risk, Automobile Liability, Workers' Compensation, and Employer's Liability insurance with limits no less than as set forth above, and to name **UES** and its subcontractors and subconsultants as additional insureds on the General Liability insurance.

12.3. Certificates of Insurance. Upon request, **UES** and Client will each provide the other with certificate(s) of insurance evidencing the existence of the policies required herein. Except for Professional Liability and Workers' Compensation Insurance, all policies required herein shall contain a waiver of subrogation.

13. OWNERSHIP AND USE OF DOCUMENTS

13.1. Client Documents. All documents provided by Client will remain the property of Client. **UES** will return all such documents to Client upon request but may retain file copies of such documents.

13.2. UES's Documents. Unless otherwise agreed in writing, all documents and information prepared by **UES** or obtained by **UES** from any third party in connection with the performance of Services, including, but not limited to, **UES's** reports, boring logs, maps, field data, field notes, drawings and specifications, laboratory test data and other similar documents (collectively "Documents") are the property of **UES**. **UES** has the right, in its sole discretion, to dispose of or retain the Documents.

13.3. Use of Documents. All Documents prepared by **UES** are solely for use by Client and will not be provided by either party to any other person or entity without **UES's** prior written consent.

13.3.1. Use by Client. Client has the right to reuse the Documents for purposes reasonably connected with the Project for which the Services are provided, including without limitation design and licensing requirements of the Project.

13.3.2. Use by UES. **UES** retains the right of ownership with respect to any patentable concepts or copyrightable materials arising from its Services and the right to use the Documents for any purpose.

13.4. Electronic Media. **UES** may agree at Client's request to provide Documents and information in an electronic format. Client recognizes that Documents or other information recorded on or transmitted as electronic media are subject to undetectable alteration due to (among other causes) transmission, conversion, media degradation, software error, or human alteration. Accordingly, all Documents and information provided by **UES** in electronic media are for



informational purposes only and not as final documentation. Unless otherwise defined in the Scope of Services, UES's electronic Documents and media will conform to UES's standards. UES will provide any requested electronic Documents for a 30-day acceptance period, and UES will correct any defects reported by Client to UES and provide one round of reasonable editorial revisions during this period. UES makes no warranties, either express or implied, regarding the fitness or suitability of any electronic Documents or media.

13.5. Unauthorized Reuse. No party other than Client may rely, and Client will not represent to any other party that it may rely on Documents without UES's express prior written consent and receipt of additional compensation. Client will not permit disclosure, mention, or communication of, or reference to the Documents in any offering circular, securities offering, loan application, real estate sales documentation, or similar promotional material without UES's express prior written consent. Client waives any and all claims against UES resulting in any way from the unauthorized reuse or alteration of Documents by itself or anyone obtaining them through Client. Client will defend, indemnify and hold harmless UES from and against any claim, action or proceeding brought by any party claiming to rely upon information or opinions contained Documents provided to such person or entity, published, disclosed or referred to without UES's prior written consent.

14. SAMPLES AND CUTTINGS

14.1. Sample Retention. If UES provides laboratory testing or analytic Services, UES will preserve such soil, rock, water, or other samples as it deems necessary for the Project, but no longer than 45 days after issuance of any Documents that include the data obtained from these samples. Client will promptly pay and be responsible for the removal and lawful disposal of all contaminated samples, cuttings, Hazardous Materials, and other hazardous substances.

14.2. Monitoring Wells. Client will take custody of all monitoring wells and probes installed during any investigation by UES and will take any and all necessary steps for the proper maintenance, repair or closure of such wells or probes at Client's expense.

15. RELATIONSHIP OF THE PARTIES

UES will perform Services under this Agreement as an independent contractor.

16. ASSIGNMENT AND SUBCONTRACTS

Neither party may assign this Agreement, in whole or in part, without the prior written consent of the other party, except for an assignment of proceeds for financing purposes. UES may subcontract for the services of others without obtaining Client's consent if UES deems it necessary or desirable for others to perform certain Services.

17. SUSPENSION AND DELAYS

17.1. Procedures. Client may, at any time by 10 days written notice suspend performance of all or any part of the Services by UES. UES may terminate this Agreement if Client suspends UES's Services for more than 60 days and Client will pay UES as set forth under Section 18, "Termination." If Client suspends UES's Services, or if Client or others delay UES's Services, Client and UES agree to equitably adjust: (1) the time for completion of the Services; and (2) UES's compensation in accordance with UES's then current SCHEDULE OF FEES for the additional labor, equipment, and other charges associated with maintaining its workforce for Client's benefit during the delay or suspension, or charges incurred by UES for demobilization and subsequent remobilization.

17.2. Liability. UES is not liable to Client for any failure to perform or delay in performance due to circumstances beyond UES's control, including but not limited to pollution, contamination, or release of hazardous substances, strikes, lockouts, riots, wars, fires, flood, explosion, pandemics, epidemics, adverse weather conditions, acts of government, labor disputes, delays in transportation or inability to obtain material and equipment in the open market.

18. TERMINATION

18.1. Termination for Convenience. UES and Client may terminate this Agreement for convenience upon 30 days written notice delivered or mailed to the other party.

18.2. Termination for Cause. In the event of material breach of this Agreement, the party not breaching the Agreement may terminate it upon 10 days written notice delivered or mailed to the other party. The termination notice shall state the basis for the termination. The Agreement may not be terminated for cause if the breaching party cures the breach within the 10-day period.

18.3. Payment on Termination. Following termination other than for UES's material breach of this Agreement, Client will pay UES for Services performed prior to the termination notice date, and for any necessary Services and expenses incurred in connection with the termination of the Project, including but not limited to, the costs of completing analysis, records and reports necessary to document job status at the time of termination and costs associated with termination of subcontractor contracts in accordance with UES's then current SCHEDULE OF FEES.

19. DISPUTES

19.1. Mediation. All disputes between UES and Client are subject to mediation. Either party may demand mediation by serving a written notice stating the essential nature of the dispute, amount of time or money claimed, and requiring that the matter be mediated within 45 days of service of notice.

19.2. Precondition to Other Action. No action or suit may be commenced unless the mediation did not occur within 45 days



after service of notice; or the mediation occurred but did not resolve the dispute; or a statute of limitation would elapse if suit was not filed prior to 45 days after service of notice.

19.3. Choice of Law; Venue. This Agreement will be construed in accordance with and governed by the laws of the State of California. Unless the parties agree otherwise, any mediation or other legal proceeding will occur in the state and county in which the Project is located.

19.4. Statutes of Limitations. Any applicable statute of limitations will be deemed to commence running on the earlier of the date of substantial completion of UES's Services under this Agreement or the date on which claimant knew, or should have known, of facts giving rise to its claims.

20. MISCELLANEOUS

20.1. Integration and Severability. This Agreement reflects the entire agreement of the parties with respect to its terms and supersedes all prior agreements, whether written or oral. If any portion of this Agreement is void or voidable, such portion will be deemed stricken and the Agreement reformed

to as closely approximate the stricken portions as the law allows.

20.2. Modification of this Agreement. This Agreement may not be modified or altered, except by a written agreement signed by authorized representatives of both parties and referring specifically to this Agreement.

20.3. Notices. Any and all notices, requests, instructions, or other communications given by either party to the other must be in writing and either hand delivered to the recipient or delivered by first-class mail (postage prepaid) or express mail (billed to sender) at the addresses given in this Agreement.

20.4. Headings. The headings used in this Agreement are for convenience only and are not a part of this Agreement.

20.5. Waiver. The waiver of any term, conditions or breach of this Agreement will not operate as a subsequent waiver of the same term, condition, or breach.

End of General Conditions

EXHIBIT A
UES Schedule of Fees

**BOARD OF TRUSTEES
RIVER DELTA UNIFIED SCHOOL DISTRICT**

445 Montezuma Street
Rio Vista, California 9457-1561

BOARD AGENDA BRIEFING

Meeting Date: December 12, 2023

Attachments: X

From: Board President Lamera

Item Number: 26

Type of item: (Action, Consent Action or Information Only): Action

SUBJECT:

Request for Future Board Agenda Items from Board Members

BACKGROUND:

During the course of time, topics from community members, staff and other notable topics of interest within the Board's jurisdiction arise. Board members need a platform to address their fellow Board colleagues to discuss future items within their jurisdiction to be added to future agendas for discussion or action.

STATUS:

The Board will review upcoming Board meetings, study sessions, and identify future agenda items.

PRESENTER:

Board President Lamera

OTHER PEOPLE WHO MIGHT BE PRESENT:

Staff

COST AND FUNDING SOURCES:

No cost to request future Board agenda items.

RECOMMENDATION:

That the Board identifies future agenda items if applicable

Time allocated: 3 minutes