San Juan Unified School District
Regular Meeting of the Board of Education
3738 Walnut Avenue, Carmichael, California 95608

Paula Villescaz, President
Michael McKibbin, Ed.D., Vice President
Zima Creason, Clerk
Pam Costa, Member
Saul Hernandez, Member

Board of Education Agenda
January 28, 2020

A. OPEN SESSION/CALL TO ORDER/ANNOUNCEMENT OF CLOSED SESSION TOPICS – 5:45 p.m.

B. CLOSED SESSION – 5:45 p.m.

1. Student expulsion in one case (Education Code section 48918[f]).
2. Collective bargaining matters – discussion with negotiator Jim Shoemake, assistant superintendent, Schools and Labor Relations, regarding CSEA Chapter 127 General/Operations support, Chauffeurs/Teamsters Local No. 150 Transportation, Supervisors, Teachers and Certificated Supervisory units; and regarding non-represented groups: management and confidential units (Government Code section 54957.6).

C. RECONVENE OPEN SESSION/PLEDGE OF ALLEGIANCE – 6:30 p.m.

D. APPROVAL OF THE MINUTES – January 14, 2020, regular meeting, pages 2210-2213.

E. ORGANIZATIONS/ANNOUNCEMENTS – 6:35 p.m.

1. Recognitions

a. 2020 Classified Employees of the Year (Oropallo)
David Harrell, Lead Roofer (Maintenance and Operations); Rita Holverstott, Intermediate Clerk Typist (Woodside K-8 School); Kari Bleile, Instructional Assistant III (San Juan High School).

b. National School Counseling Week (February 3-7) (Messer)
Action: adoption of Resolution No. A-394 proclaiming February 3-7 as National School Counseling Week.

2. High School Student Council Reports
3. Staff Reports
4. Board-appointed/District Committees
5. Employee Organizations
6. Other District Organizations
7. Closed Session/Expulsion Actions (Government Code section 54957.1)

F. VISITOR COMMENTS – 6:50 p.m.

Board Bylaw 9323 limits visitor comments to two (2) minutes per speaker, with no more than 30 minutes per single topic. Time will be extended for any speaker who uses an interpreter.

G. CONSENT CALENDAR – G-1/G-8 – 7:20 p.m.

Action: The administration recommends that the consent calendar, G-1 through G-8, regarding regular business items, be approved. Any item may be removed for further discussion and separate action following consideration of remaining agenda items.

1. *Personnel – appointments, leaves of absence, separations and job description/salary range change.

2. *Purchasing Report – purchase orders and service agreements, change orders, construction and public works bids and piggyback contracts.

3. *Business/Financial Report – notices of completion and warrants and payroll.

4. Acceptance of the following gifts (# = donor's est.):
Bella Vista High School: from Bella Vista Athletics – for new Fender Passport Venue 600W portable PA system: $1,000.
El Camino Fundamental High School: from The Green Technology Group – for Martin Luther King Jr. Day of Service t-shirts: $500.
Encina Preparatory High School: from Sacramento Running Association – for student body and volleyball club: $650; from Balanced Body Inc.: $50.

Mesa Verde High School: from Cindy Kent – for business academy clothing: $300, general clothes closet: $100 and golf team donation: $400.
Nutrition Services: from Jennifer Friedberg – for payment toward the negative meal balance at Churchill Middle School: $1,300; from Rebekah Green, David Green and Leslie Green – for payment toward the year-end negative meal balance: $100; from David Mason – for payment toward the year-end negative meal balance at California Montessori Project, American River Campus.
Rio Americano High School: from Balanced Body Inc.: $350.

5. *Approval to dispose of surplus property pursuant to Board Policy (BP) 3270 and Education Code sections 17545 and 17546.

6. *Approval of the School Accountability Report Cards (SARCs).

7. *Approval of the first amendment to the lease agreement at 6240 San Juan Avenue, Citrus Heights, California, for additional storage space for surplus furniture due to bond construction projects.

8. *Approval of the Agreement for Purchase and Sale of Real Property between SJUSD and the Sylvan Cemetery District.

*Material provided.

H. CONSENT CALENDAR (continued, if necessary)
Discussion and action on the items removed from the consent calendar.

I. BUSINESS ITEMS

1. Continuous Improvement Series: Social Emotional Learning – 7:25 p.m. (Calvin)
Material provided.

Report: regarding an update on social emotional learning.

2. Annual Policy Review – 7:55 p.m. (Simlick)
Material provided.

Discussion: review of the following board policies (BP) as required by state and local law (annual policy review): BP 3430 Investing and Debt Management; BP 5116.1 Intradistrict Open Enrollment; BP 6020 Parent Involvement and Family Engagement; BP 6145 Extracurricular/Cocurricular Activities. Action anticipated: 02/11/2020.

3. Tentative Agreements: SJTA, SJPEC, SJSA, Teamsters – 8:00 p.m. (Shoemake)
Material provided. (Discussed: 01/14/2020)

Public Comment/Action: The superintendent is recommending that the board approve the tentative agreements between the following employee groups and SJUSD:

a. San Juan Teachers Association (SJTA)
b. San Juan Professional Educators Coalition (SJPEC)
c. San Juan Supervisors Association (SJSA)
d. Teamsters Local No. 150

4. One-time, Off-schedule Payment: SJAA, Cabinet, Confidential Group, Unrepresented – 8:05 p.m. (Shoemake)
Material provided. (Discussed: 01/14/2020)

Public Comment/Action: The superintendent is recommending that the board approve the one-time, off-schedule payment for the following employee groups:

a. San Juan Administrators Association (SJAA) and Cabinet
b. Confidential Group and Unrepresented Specialists

5. **PARS Supplementary Retirement Plan – 8:10 p.m.** (Oropallo)
   Material provided.

   Action: The superintendent is recommending that the board adopt Resolution No. 2970 approving the Public Agency Retirement Services (PARS) supplementary retirement plan for certificated non-management, certificated management, classified non-management, classified management and confidential employees.

J. BOARD REPORTS – 8:15 p.m.

K. FUTURE AGENDA – 8:25 p.m.
The board may wish to identify items to be discussed at future meetings and the reason therefore.

L. VISITOR COMMENTS – 8:30 p.m.

B. CLOSED SESSION (continued, if necessary)
Announcement of topics/announcement of actions.

M. ADJOURNMENT – 8:35 p.m.

The Board of Education welcomes and encourages the public's participation at the board meetings and has devoted time throughout the meeting for that purpose. You may comment on items included on this agenda; however, we ask that you limit your comments to two (2) minutes, so that as many people as possible may be heard (Education Code section 35145.5, Government Code section 54954.3). When an item indicates "material provided," the additional information is available prior to the meeting in the Information and Communication Office, 3738 Walnut Avenue, Carmichael, (916) 979-8281, or on the district website at www.sanjuan.edu.

*A person with a disability may contact the Board of Education office at (916) 971-7111 or email **stephanie.cunningham@sanjuan.edu** at least 48 hours before the scheduled board meeting to request receipt of an agenda and other distributed writings in an appropriate alternative format, or to request disability-related modifications or accommodations, including auxiliary aids or services, in order to participate in the public board meeting.*

NOTE: The times indicated are approximate.

Mission Statement
Valuing diversity and excellence, the San Juan Unified School District's mission is to educate and inspire each student to succeed and responsibly contribute to a radically evolving world by providing innovative, rigorous, student-focused instruction and programs in a safe, caring and collaborative learning community.

San Juan Unified School District
Board of Education
3738 Walnut Avenue, Carmichael, California 95608

Board of Education Minutes
January 14, 2020

Regular Meeting
Board of Education
5:00 p.m.

Call to Order (A)
The January 14 regular meeting was called to order by the president, Paula Villescaz.

Roll Call
Present:
Paula Villescaz, president
Michael McKibbin, Ed.D., vice president
Zima Creason, clerk
Pam Costa, member
Saul Hernandez, member

Recess: Closed Session (B)
The meeting was immediately recessed, with the board convening in closed session to consider student expulsions in two cases and a student readmission in one case (Education Code section 48918[f]); to discuss one personnel matter: superintendent's mid-year evaluation (Government Code section 54957); to conference with legal counsel: one Uniform Complaint Procedure appeal pursuant to board policy 1312.3 (Education Code section 35146); and to discuss with negotiator Jim Shoemake, assistant superintendent, Schools and Labor Relations, regarding CSEA Chapter 127 General/Operations support, Chauffeurs/Teamsters Local No. 150 Transportation, Supervisors, Teachers and Certificated Supervisory units, and regarding non-represented groups: management and confidential units (Government Code section 54957.6).

Reconvene Open Session/Pledge of Allegiance (C)
At 6:30 p.m., four members of the Del Campo High School Air Force Junior ROTC led the group in the Pledge of Allegiance.

Minutes Approved (D)
It was moved by Ms. Creason, seconded by Dr. McKibbin, that the minutes of the December 10 regular meeting be approved. MOTION CARRIED UNANIMOUSLY [Villescaz, McKibbin, Creason, Costa, Hernandez].

High School Student Council Reports (E-1)
High school student council representatives Kyle Lucena from La Entrada High School, Jordyn Davies from El Sereno High School and Isaiah Showen from Meraki High School updated the board on the goals, activities and achievements at their respective schools.

Closed Session/Expulsion Actions (E-6)
Ms. Creason reported that the board voted unanimously to accept a hearing panel's recommendation of one expulsion in case number M-05 and one suspended expulsion in case number S-15 and to also accept as written one denied readmission in case number RA-07.

Visitor Comments (F)
Julie Miller, principal at California Montessori Project American River campus, shared information about projects and events at the school.

Consent Calendar Approved (G-1/G-13)
It was moved by Ms. Costa, seconded by Ms. Creason, that the consent calendar items G-1 through G-13 be approved. MOTION CARRIED UNANIMOUSLY [Villescaz, McKibbin, Creason, Costa, Hernandez].

Personnel (G-1)
Appointments, leaves of absence, separations and job description/salary range change — approved as submitted.

Purchasing Report (G-2)
Purchase orders and service agreements, change orders, construction and public works bids, piggyback contracts and zero dollar contract — approved as submitted.

Business/Financial Report (G-3)
Notices of completion and warrants and payroll — approved as submitted.

Gifts (G-4)
Acceptance of gifts to the Department of Teaching and Learning, Encina Preparatory High School, Gold River Discovery Center, Laurel Ruff Transition School, Nutrition Services, San Juan High School and White House Counseling Center.

Disposal of Surplus Property (G-5)
Approval to dispose of surplus property pursuant to board policy (BP) 3270 and Education Code sections 17545 and 17546.

Participation in Federal Surplus Property Program (G-6)
Adoption of Resolution No. 2969 allowing participation in the Federal Surplus Property Program, which authorizes district representatives to acquire surplus property through the auspices of the California State Agency for Surplus Property.

CEQA Notice of Exemption (G-7)
Approval of the CEQA Notice of Exemption for the Barrett Middle School Modernization Project.

Grant: Project Cal-Well 2019-2022 (G-8)
Approval to implement the following funded grant: Project Cal-Well, 2019-2022.

Grant: After School Education and Safety Program Universal Grant (G-9)
Approval to implement, if funded, the following grant: After School Education and Safety Program Universal Grant, 2020-2021.

Grant: CTE Facilities Program Grant, Del Campo High School, Emergency Response Program (G-10)
Approval to implement, if funded, the following grant: Career Technical Education Facilities Program Grant, Del Campo High School, Emergency Response Program, 2019-2022.

Grant: CTE Facilities Program Grant, Del Campo High School, Production and Managerial Arts Program (G-11)
Approval to implement, if funded, the following grant: Career Technical Education Facilities Program Grant, Del Campo High School, Production and Managerial Arts Program, 2019-2022.

Grant: CTE Incentive Grant (G-12)
Approval to implement, if funded, the following grant: Career Technical Education Incentive Grant, 2019-2020.

Grant: National School Lunch Equipment Assistance Grant (G-13)
Approval to implement, if funded, the following grant: National School Lunch Equipment Assistance Grant, 2019-2020.

Continuous Improvement Series: Equity Update (I-1)
Assistant Superintendent of Educational Services Debra Calvin, Ed.D., introduced Director of Equity and Student Achievement Diana Marshall who provided an update on the work of the Equity Department. Ms. Marshall explained that the department's current initiatives to improve school climate and culture include: expanding practices across the system, expanding social justice, forming equity liaisons and providing site-level support. Ms. Marshall stated that seven schools have taken part in customized, multi-day professional development opportunities related to socially relevant strategies, and five schools have sought assistance from the Equity Department with their school site initiatives. Principal Aaron Wurtzer and teacher Amy Day shared information related to developing school climate and culture at Will Rogers Middle School,

explaining that an advisory period was added to all student schedules, allowing time to focus on social and emotional learning. Ms. Day outlined the steps in the initial implementation process of the advisory period, which has now evolved into an advisory club model that encompasses a student-influenced approach. Mr. Wurtzer spoke about the results of the staff and student climate survey, which resulted in four focus areas to help direct next steps at the school. Board members asked questions and made comments related to the Will Rogers advisory clubs (McKibbin); professional development for staff (Creason); identifying areas of success to build on and areas of improvement for continuous growth (Costa); and the refinement of the Will Rogers advisory clubs and the engagement of all practioners in the process (Villescaz).

Strategic Framework (I-2)
Senior Director of Professional Learning and Innovation Kristan Schnepp introduced Director of Continuous Improvement and LCAP Adam Ebrahim who presented an extensive update on the strategic framework development process which began in September 2019. Mr. Ebrahim outlined the components of the strategic framework: mission statement, shared values, equity lens and focus areas. Mr. Ebrahim explained that a task force was formed, and it was charged with generating questions for inquiry for the broader stakeholder engagement process, which included community forums and targeted outreach with cultural brokers. SJTA President Bill Simmons, community partner David Augusto and student Daisy Trotti shared their experiences as participants on the task force. Mr. Ebrahim solicited input from board members regarding the proposed mission statement, which uses a passive voice, and a revised mission statement, which uses an active voice. Board members made comments and expressed support for the revised mission statement.

Mr. Ebrahim went on to explain that the strategic framework and LCAP will work dynamically together. Mr. Ebrahim posed guiding questions to the board for input and discussion. Ms. Costa stated that she found the Cultural Brokers Network report and the stakeholder comments from the forums very valuable, and that the strategic framework document reflects exemplary examples of both stakeholder voice and stakeholder engagement. Ms. Costa inquired how community members can give feedback now that the winter community forums have been canceled. Mr. Ebrahim explained there has now been a shift to a more targeted and collaborative approach, which includes focus area teams and Local Control and Accountability Plan Parent Advisory Committee (LCAP PAC) study groups, but stakeholders are still invited to give feedback at an LCAP PAC meeting or on the district website. Mr. Hernandez asked Ms. Trotti for her recommendations on how to get more students to participate in the process. Ms. Trotti stated that only four high schools were represented and that asking principals for student recommendations might be one option. Dr. McKibbin agreed that the Cultural Brokers Network report was valuable, and he appreciated the efforts to seek input from such a diverse group of stakeholders. Ms. Villescaz stated she supports involving more students in the process and that she hopes the targeted approach does not become a narrower approach. Superintendent Kern shared that stakeholder voice is much more prevalent than it was in past years, and he looks forward to the continued growth with community partners.

Williams Report (I-3)
General Counsel Linda Simlick explained that the district must report on the status of Williams-type complaints filed with the district per Education Code section 35186(d), which requires each school district to publicly report, on a quarterly basis, summarized data on the nature and resolution of all Williams-type complaints. Ms. Simlick stated that, during the time period from October through December 2019, there were no Williams-type complaints filed.

Reduction of Classified Positions (I-4)
Superintendent Kern explained that a resolution is necessary to address the statutory process for reducing or eliminating certain classified positions, effective March 16, 2020, due to lack of work and/or lack of funds.

It was moved by Dr. McKibbin, seconded by Mr. Hernandez, to adopt Resolution No. 2968, reducing or eliminating certain classified positions, effective March 16, 2020, due to lack of work and/or lack of funds. MOTION CARRIED UNANIMOUSLY [Villescaz, McKibbin, Creason, Costa, Hernandez].

Tentative Agreements: SJTA, SJPEC, SJSA, Teamsters (I-5 a,b,c,d)
Assistant Superintendent of Schools and Labor Relations Jim Shoemake explained that tentative agreements have been reached between SJUSD and the following bargaining groups: San Juan Teachers Association (SJTA); San Juan Professional Educators Coalition (SJPEC); San Juan Supervisors Association (SJSA); and Teamsters Local No. 150. Public comment/action was scheduled for January 28.

One-time, Off-schedule Payment: SJAA, Cabinet, Confidential Group, Unrepresented (I-6 a,b)
Assistant Superintendent of Schools and Labor Relations Jim Shoemake explained that a one-time, off-schedule payment is being proposed for the San Juan Administrators Association (SJAA), Cabinet, Confidential Group and Unrepresented Specialists. Public comment/action was scheduled for January 28.

Board Reports (J)
Ms. Creason reported that the link to Encina's fundraising campaign for the senior class trip to Santa Cruz is now active and that she recently visited Thomas Kelly Elementary School, where she made a personal pledge to donate books in a variety of languages to the school library.

Mr. Hernandez stated that he attended the Giving Tree event at Thomas Kelly Elementary School, where he was overwhelmed by the generosity of the community as entire families received gifts and food for the holidays.

Ms. Costa commended Maintenance and Operations and Cabinet for their annual holiday events, and she noted that she, Dr. McKibbin and Mr. Hernandez attended the Kids Helping Kids 8th annual signature gala, where it was enjoyable to watch how sophisticated the students were in working with the public as they raised $85,000.

Dr. McKibbin reported that he participated in Orangevale Rotary's annual distribution of dictionaries to third-graders, and he attended the Orangevale Community Council, where all Orangevale schools were proudly represented.

Ms. Villescaz shared that she and Ms. Costa attended Mira Loma's annual IB Alumni Celebration honoring the Class of 2019 graduates and that she is participating in the Fair Oaks Rotary Club mentoring program at Meraki High School.

Future Agenda (K)
There were no items added to the future agenda.

Closed Session (B) (continued)
Ms. Villescaz announced that the board would return to closed session to continue item B-3, conference with legal counsel regarding one Uniform Complaint Procedure appeal pursuant to board policy 1312.3 (Education Code section 35146).

Adjournment (M)
At 8:50 p.m., there being no further announcements or business, the regular meeting was adjourned.

_____ _____
Paula Villescaz, President Kent Kern, Executive Secretary

Approved: _____
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SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION

AGENDA ITEM: **E-1(a)**

MEETING DATE: **01/28/2020**

SUBJECT: 2020 Classified Employees of the Year

CHECK ONE:
For Discussion: ☐
For Action: ☐
Report: ☐
Workshop: ☐
Recognition: ☒
Emergency Action: ☐

DEPARTMENT: Human Resources

ACTION REQUESTED:
The superintendent is recommending that the board recognize three (3) classified employees nominated as San Juan Unified School District's 2020 Classified Employees of the Year.

RATIONALE/BACKGROUND:
Each year the district recognizes classified employees for their exceptional service, dedication and commitment to the San Juan Unified School District and the surrounding community. The three (3) honoree names listed below will be forwarded to the Sacramento County Office of Education as San Juan's nominations for the countywide Classified Employees of the Year Program:

1. David Harrell, Lead Roofer, Maintenance and Operations
2. Rita Holverstott, Intermediate Clerk Typist, Woodside K-8 School
3. Kari Bleile, Instructional Assistant III, San Juan High School

PREVIOUS STAFF/BOARD ACTION:
Superintendent's Cabinet: 01/21/2020

FISCAL IMPACT:
Current Budget: $ N/A
Additional Budget: $ N/A
Funding Source: N/A
(unrestricted base, supplemental, other restricted, etc.)
Current Year Only ☐ Ongoing ☐

LCAP/STRATEGIC PLAN:
Goal: N/A Focus: N/A
Action: N/A
Strategic Plan: N/A

PREPARED BY: Peggy Purvis, Director, Human Resources, Classified PP

APPROVED BY: Paul Oropallo, Assistant Superintendent, Human Resources
Kent Kern, Superintendent of Schools KK

SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION

AGENDA ITEM: **E-1(b)**

MEETING DATE: **01/28/2020**

SUBJECT: National School Counseling Week

CHECK ONE:
For Discussion: ☐
For Action: ☐
Report: ☐
Workshop: ☐
Recognition: ☒
Emergency Action: ☐

DEPARTMENT: Division of Teaching and Learning

ACTION REQUESTED:
The superintendent is recommending that the board adopt Resolution No. A-394, proclaiming the week of February 3-7, 2020, as National School Counseling Week 2020.

RATIONALE/BACKGROUND:
The American School Counselor Association (ASCA) proclaimed the week of February 3-7 as National School Counseling Week 2020. Public attention will be focused on the unique contributions of professional school counselors within the U.S. school systems and within the San Juan Unified School District as school counselors assist students, families and staff to support the district's Local Control and Accountability Plan (LCAP) and Strategic Plan. National School Counseling Week affords the district the opportunity to recognize the contributions school counselors make in support of students' academic, personal/social and postsecondary successes, and highlights the tremendous impact they have in helping students achieve school success and plan for a career.

Once adopted, a copy of the resolution and a letter will be sent to all school counselors.

ATTACHMENT(S):
A: Resolution No. A-394

BOARD COMMITTEE ACTION/COMMENT:
N/A

PREVIOUS STAFF/BOARD ACTION:
Superintendent's Cabinet: 01/21/2020

FISCAL IMPACT:
Current Budget: $ N/A
Additional Budget: $ N/A
Funding Source: N/A
Current Year Only ☒ Ongoing ☐

LCAP/STRATEGIC PLAN:
Goal: 1, 2 Focus: 5, 6, 3
Action: 10, 35, 5
Strategic Plan: N/A

PREPARED BY: Brett Wolfe, Director, CTE, K-12 Counseling and College/Career Readiness
Rick Messer, Assistant Superintendent, Secondary Education

APPROVED BY: Melissa Bassanelli, Deputy Superintendent, Schools and Student Support
Kent Kern, Superintendent of Schools

SAN JUAN UNIFIED SCHOOL DISTRICT
Resolution No. A-394

National School Counseling Week
February 3-7, 2020

WHEREAS, National School Counseling Week is February 3-7, 2020; and

WHEREAS, the special week honoring school counselors provides recognition for school counselors who implement comprehensive school counseling programs and support the San Juan Unified School District Local Control and Accountability Plan (LCAP) and Strategic Plan, vital parts of the educational process for all students as they meet the challenges of the 21st century; and

WHEREAS, the San Juan Unified School District appreciates and supports school counselors for being actively engaged in helping students examine their abilities, strengths, interests and talents; for working in positive ways to enhance students' social/personal, academic and career development; and for working with teachers and other educators to inspire each student to responsibly contribute to a radically evolving world in a safe, caring and collaborative learning community; and

WHEREAS, school counselors are further recognized for developing comprehensive developmental school counseling programs that are considered an integral part of the educational process and enable all students to achieve success in school; and

THEREFORE, BE IT RESOLVED that the board joins the superintendent and staff in honoring school counselors during National School Counseling Week and throughout the year.

Attested to this 28th day of January, 2020

_____
Paula Villescaz, President

_____
Kent Kern, Superintendent of Schools

_____
Michael McKibbin, Ed.D., Vice President

_____
Zima Creason, Clerk

_____
Pam Costa, Member

_____
Saul Hernandez, Member

Board of Education
San Juan Unified School District
Sacramento County, California

SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION

AGENDA ITEM: G-1
MEETING DATE: 1/28/2020
APPROVED:

HUMAN RESOURCES

The following reports are submitted for board approval

Personnel Pages	Page #
Appointments	
Management	1
Certificated	1
Classified	1
Leaves of Absence	
Management	
Certificated	
Classified	1
Separations	
Management	
Certificated	1
Classified	2
Pre-Retirement Reduced Workload	
Reassignments/Change in Work Year	
Errata	
Job Description/Salary Range Change	
Management	
Certificated	
Classified	2 – 4
Unrepresented	
Cabinet Contracts/Extension of Contract	
Recommendation to Extend A District Intern Credential	
Certificated	
Credential Approval Recommendations	
Certificated	
Charter School Personnel Actions	
Choices	

Agenda for the January 28, 2020 Board Meeting

1. APPOINTMENTS

MANAGEMENT

Type	Name	Status	Assignment	Location	Effective Date (s)	
Promotion	Jones, Michael	Prob	Coordinator, Safe Schools Planning and Training	Safe Schools	01/27/20	

CERTIFICATED

Type	Name	Status	Assignment	Location	Effective Date (s)	
New Hire	Alva, Christina	Temp	Tch-Child Develop Permit	Early Childhood Education	01/06/20	06/30/20
New Hire	Erfert, Paulette	Prob	School Nurse	Health Services	01/08/20	
New Hire	Medici, Jason	Temp	Teacher Grade 7/8	Churchill	01/09/20	06/10/20
New Hire	Nurmela, Ryan	Temp	Teacher Grade 9/12	Del Campo	01/09/20	06/10/20
New Hire	Shelby, Jared	Temp	Teacher Grade 3	Cambridge Heights	01/07/20	06/10/20
Rehire	Beireis, Gracie	Temp	Teacher Grade 7/8	Woodside	01/07/20	06/10/20
Rehire	Cook, Joan	Temp	Teacher Grade 5	Mariemont	12/19/19	06/10/20
Rehire	Gallegos, Jaclyn	Temp	Teacher Grade 6	Del Paso Manor	01/07/20	06/10/20
Rehire	Gallo, Nicole	Prob	Counselor-Special Programs	LSC Region 2 @ Barrett	01/07/20	
Rehire	Ndirangu, Wangui	Temp	Preschool Teacher	Early Childhood Education	01/06/20	03/17/20
Rehire	Rius, Mark	Temp	Teacher Grade 7/8	Lichen	10/30/19	12/31/19

CLASSIFIED

Type	Name	Status	Assignment	Location	Effective Date (s)	
New Hire	Altamira, Shirley	Prob	Mental Health Therapist	White House Counseling	01/02/20	
New Hire	Chamizo, Rosa	Prob	Custodian	Mesa Verde	01/07/20	
New Hire	Dehghani, Hamid	Prob	Inst Assist Bilingual-Farsi	Churchill	01/07/20	
New Hire	Frias, Vanessa	Prob	Nutrition Services Worker I	El Camino	01/07/20	
New Hire	Hernandez, Mixcoatl	Prob	Custodial Equipment Tech	Maintenance and Operations	01/06/20	
New Hire	Hill, Susan	Prob	Nutrition Services Worker I	Dewey	01/07/20	
New Hire	Kane, Kimberlee	Prob	Nutrition Services Worker I	El Camino	01/07/20	
New Hire	Momand, Fazal	Prob	Inst Assist Bilingual-Farsi	Dyer-Kelly	01/07/20	
New Hire	Pineda Ambriz, Martha	Prob	Non-Instruct Support Aide	General Davie Jr.	12/19/19	
New Hire	Piran, Jamileh	Prob	Instructional Assist-Health	Health Services	01/14/20	
New Hire	Radmanesh, Mohammad	Prob	Sch/Comm Resource Assist	English Language Learning	01/06/20	
New Hire	Regoli, Kimberly	Prob	Nutrition Services Worker I	Del Campo	01/07/20	
New Hire	Simpson, Rafael	Prob	Custodian	Encina	01/07/20	
New Hire	Surette, Delphis	Prob	Instructional Assistant III	Barrett	01/14/20	
New Hire	Weinreich, Rosanne	Prob	Intermediate Clerk Typist	El Sereno	01/07/20	
New Hire	Young, Marcie	Prob	Nutrition Services Worker I	Casa Roble	01/07/20	
New Hire	Zelidon, Elizabeth	Prob	Communications Specialist	Communications	12/23/19	
Rehire	Brooks, Norean	Prob	Campus Representative	Charles Peck	01/08/20	
Rehire	French, Clarissa	Prob	Youth/Adult Employ Tech	Meraki	12/19/19	

2. LEAVES OF ABSENCE

CLASSIFIED

Type	Name	Status	Assignment	Location	Effective Date (s)	
Unpaid	Eutsey, Jennifer	Perm	IA-Multi/Severely Hndcp	Ralph Richardson	03/14/20	06/09/20
Unpaid	Piglitsin, Svetlana	Perm	Custodian	Edison	01/17/20	02/18/20
Unpaid	Sosa, Melissa	Perm	Instructional Assistant III	Special Education – Kenneth	04/03/20	05/17/20

3. SEPARATIONS

CERTIFICATED

Type	Name	Status	Assignment	Location	Effective Date (s)	
Resignation	Costelow-Colvin, Jennifer	Prob	School Social Worker	LSC Region 2 @ Barrett	12/20/19	
Resignation	Erickson, David	Perm	Teacher Grade 9/12	San Juan	12/20/19	
Resignation	Jackman, Sara	Prob	Tch-Emotionally Dstbd	Coyle Avenue	12/20/19	
Resignation	Larson, Melanie	Prob	Counselor-Special Programs	LSC Region 2 @ Barrett	12/20/19	
Resignation	Meschia, Steven	Temp	Teacher Grade 9/12	Del Campo	01/06/20	
Resignation	Pierce, Kari	Perm	Tch-(ED) Emotional Dstbd	La Vista	06/12/19	
Termination	Duarte, Shalley	Temp	Teacher Grade 7/8	Kingswood	12/20/19	

3. SEPARATIONS (Continued)

CLASSIFIED

Type	Name	Status	Assignment	Location	Effective Date (s)
Resignation	Amador, Olga	Prob	School Playground Rec Aide	Gold River	01/08/20
Resignation	Combs, Aurielle	Perm	Grants Technician	Grants Office	01/08/20
Resignation	Dixon, Jean	Perm	Nutrition Services Worker II	Whitney Avenue	11/30/19
Resignation	Law, Jennifer	Prob	Child Develop Assistant-SA	Pershing ECE	12/06/19
Resignation	Maricle, Stephen	Perm	Nutrition Services Worker I	Starr King	12/20/19
Resignation	Rodriquez, Natalie	Prob	School Playground Rec Aide	Trajan	12/20/19
Resignation	Thomas, Deandre	Perm	Sch/Comm Prevention Spec	Pupil Personnel Services	01/06/20
Resignation	Yaya, Lily	Perm	Inst Assist Bilingual-Spanish	Howe Avenue	12/20/19
Retirement	Bujalski, Michael	Perm	Welder/Fabricator	Maintenance and Operations	12/30/19
Retirement	Butler, Peter	Perm	Custodial Equipment Tech	Maintenance and Operations	12/30/19
Retirement	Casebeer, Jeri	Perm	Payroll Technician I	Payroll	12/30/19
Retirement	Goggia, Loraine	Perm	Intermediate Clerk	Health Services	12/30/19
Retirement	Gumbiner, Susan	Perm	IA-Multi/Severely Hndcp	Laurel Ruff	12/31/19
Retirement	Land, Nancy	Perm	Intermediate Clerk Typist	San Juan	12/30/19
Retirement	Long, Carole	Perm	Technology Liaison III SIS	Technology Services	12/30/19
Retirement	Pryor, Steven	Perm	Groundskeeper/Gardener	Maintenance and Operations	12/30/19
Retirement	Snider, Robin	Perm	Administrative Assist IV	Student Support Services	12/30/19
Retirement	Thompson, Katherine	Perm	Health Assistant	Early Childhood Education	12/30/19

4. JOB DESCRIPTION / SALARY RANGE CHANGE

CLASSIFIED

Class Title	Unit	New/Update	Old Salary Range	New Salary Range	Effective Date (s)
Data Compliance Technician	CSEA	New	N/A	27	01/29/20

JOB DESCRIPTION

Position Code: TBD
Classified Group: CSEA
Salary Range: 27
Work Calendar: 001

POSITION TITLE: Data and Compliance Technician

DEFINITION: Under general direction, supports, maintains and updates the special education database, the online individualized education program (IEP) system, and other software/programs as assigned; ensures district compliance with applicable federal and state timelines and associated record keeping and reporting for assigned areas of responsibility.

DIRECTLY RESPONSIBLE TO: Assistant Director, Special Education

SUPERVISION OVER: N/A

DUTIES AND RESPONSIBILTIES: (Any one position may not include all of the duties listed; the listed examples do not include all duties and responsibilities that may be found in positions within this classification.):

1. Supports, maintains and updates the special education database and online IEP system and ensures the accuracy of data reported.
2. Receives and reviews documents from special education programs and/or school sites for accuracy and completeness and enters data into the special education database and other applicable programs.
3. Prepares and generates a variety of reports for federal and state compliance for assigned areas of responsibility.
4. Assists with monitoring IEP meeting timelines and providing IEP forms to district staff to complete within established timelines.
5. Serves as a technical advisor to provide support and assistance to end-users who utilize the special education database and other applicable programs.
6. Communicates with special education staff and school sites to exchange student information.
7. Maintains a variety of records and files for assigned areas of responsibility.
8. May assist in the development of trainings and department procedures related to the online IEP system.
9. May assist with department projects related to assigned areas of responsibility, as needed.
10. Attends meetings and workshops related to areas of responsibility, as assigned or required.
11. Performs related work as required.

QUALIFICATIONS:

Education and Experience:
Two years of experience or demonstrated ability to perform job duties using student record database and other programs/information systems; experience providing end-user assistance is highly desirable.

Licenses and Certificates:

- Valid Class C driver's license issued by the California Department of Motor Vehicles within 30 days of hire or before driving any vehicle requiring this license

Knowledge, Skills, and Abilities:
- Knowledge of applicable federal and state regulations, laws, and guidelines
- Knowledge of applicable district and departmental policies and procedures
- Knowledge of Special Education Information System (SEIS) and the Individual Education Plan (IEP) system
- Knowledge of the California Longitudinal Pupil Achievement Data System (CALPADS)
- Knowledge and skill in the use of computers and assorted software programs
- Knowledge of interpersonal skills using tact, patience, and courtesy
- Ability to learn and apply technical and legal guidelines and procedures in a consistent and objective manner
- Ability to understand and follow verbal and written instructions
- Ability to communicate effectively, both verbally and in writing, with all levels of district staff
- Ability to work independently, with minimum direction, and make decisions within the framework of established guidelines
- Ability to work effectively with all levels of district staff
- Ability to maintain confidentiality of privileged information obtained in the course of work
- Ability to maintain consistent, punctual and regular attendance

WORKING CONDITIONS:

Work Environment:
- Indoor office environment
- Moderate noise
- Continuous contact with staff
- Frequent interruptions and significant distractions

Typical Physical Characteristics: (with or without use of aids; consideration will be given to reasonable accommodation).
- Communicate to exchange information both in person, in small groups, and/or on the telephone
- Inspect documents and other written materials with fine print
- Move about facilities to conduct work, including walking, standing, sitting, or remaining in a stationary position for extended periods of time
- Operate office equipment requiring repetitive hand movement and fine coordination

Other Characteristics:
- Ability to work additional hours and weekends on occasion
- Ability to travel locally and attend workshops/seminars periodically

This job description is not a complete statement of essential functions and responsibilities. The district retains the discretion to add or change typical duties of a position at any time.

Board Approved: TBD

SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION

AGENDA ITEM: G-2
MEETING DATE: 01/28/2020

APPROVED: KS KK
Kent Stephens

Purchasing Contracts Report

The following reports are submitted for board approval/ratification:

	Inc	Page #
Purchase Orders & Service Agreements	✓	1
Change Orders	✓	2
Construction & Public Works Bids	✓	3
Piggyback Contracts	✓	4
Zero Dollar Contract	NA	
Bids/RFPs	NA	
Other	NA	
ERRATA	NA	

Purchasing Contracts Board Report
Purchase Orders, Service Agreements, and Awards

December 18, 2019 - January 14, 2020

PO#	Date	Vendor Name	Description	Amount $	Site/Department
TBD	01/13/2020	KYA Services LLC	Casa Roble 209-9349-J1 Flooring project, new flooring for whole site, piggyback contract	$ 752,421.71	216 - Facilities
TBD	01/14/2020	Turnitin, LLC	Software to protect and promote academic integrity. Three year contract 3/1/20-7/31/2021: Year 1 $11,377.11 Year 2 $46,284.64 Year 3 $52,642.96	$110,304.71	240 - Tech Services

Purchasing Contracts Board Report
Change Orders/Amendments for Items $92,600

December 18, 2019 - January 14, 2020

Change Orders

PO#	Date	Vendor Name	Description	Original PO Amount $	Previous Approved C/O Totals $	Current C/O for Approval Amount $	New Contract Amount $	Responsibility
003893	01/7/2020	School Steps (Speech)	Additional services needed	$ 92,000.00	-	$ 130,000.00	222,000.00	101 - Spec. Ed.
004123	01/7/2020	School Steps (Psych)	Additional services needed	$ 92,000.00	-	$ 222,200.00	314,200.00	101 - Spec. Ed.
001692	01/7/2020	RX Healthcare Services	Additional services needed	$ 54,000.00	-	$ 163,000.00	217,000.00	101 - Spec. Ed.

Service Agreement Change Orders

PO#	Date	Vendor Name	Description	Original PO Amount $	Previous Approved C/O Totals $	Current C/O for Approval Amount $	New Contract Amount $	Responsibility
							-	

Contract Consultant Amendments/Change Orders

PO#	Date	Vendor Name	Description	Original PO Amount $	Previous Approved C/O Totals $	Current C/O for Approval Amount $	New Contract Amount $	Responsibility
							-	
							-	

General Contract/LeaseLease Back/Design Build Contract Amendments/Change Orders

PO#	Date	Vendor Name	Description	Original PO Amount $	Previous Approved C/O Totals $	Current C/O for Approval Amount $	New Contract Amount $	Responsibility
000023	01/13/2020	BRCO Constructors, Inc.	Project 171-9390-J1 Carriage HVAC, CCD number 32, 33 additional work	$ 2,435,000.00	$ 50,478.00	$ 12,078.00	$ 2,497,556.00	216 - Facilities
000023	01/13/2020	American River Construction	Project 173-9390-J1 Ottomon HVAC, CCD number 19, 20, 21 additional work	$ 2,222,000.00	$ 58,636.43	$ 12,317.60	$ 2,292,954.03	216 - Facilities

December 18, 2019 - January 14, 2020

Upon evaluation of the bids/contracts staff has awarded the following in accordance with all legal guidelines.

General Contract/LeaseLease Back/Design Build Contracts

Fund	Date	PO#	Bid #	Vendor Name	Description	Amount $	Responsibility
26	01/14/2020	TBD	20-110	B&M Builders, Inc.	Bella Vista 206-9513-P1 Outdoor Learning project, contract for path of travel improvements	$ 181,651.00	216 - Facilities
26	01/14/2020	TBD	20-108	Landmark Construction	Barrett 004-9512-P1 New Construction project, LeaseLease Back contract	$ 26,000,000.00	216 - Facilities
26	01/14/2020	TBD	20-108	Landmark Construction	Barrett 004-9495-P1 MOD project, LeaseLease Back contract	$ 19,000,000.00	216 - Facilities

Other Contracts

Fund	Date	PO#	Bid #	Vendor Name	Description	Amount $	Responsibility

New Addendum to Master Agreements

Fund	Date	PO#	Bid #	Vendor Name	Description	Amount $	Responsibility

Purchasing Contracts Board Report
Board Pre-Approval
Piggyback Contracts

December 18, 2019 - January 14, 2020

Staff has determined that purchasing through contracts issued by various state agencies within the State of California will save administrative time and expense, provide favorable pricing, and will be in the best interests of the District. District staff is requesting the Board of Education's authorization to piggyback on the approved bids in accordance with Public Contract Code Section 20118.

Fund	Date	PO#	Piggyback #, Title	Vendor Name	Description	Term
01	01/1/2020	TBD	Contract #PRC000630, Contract Project # 06001521-1001-461221 Janitorial Supplies (CITYWIDE)	ABE Janitorial Supply Company	Janitorial Supplies	01/01/2020 - 12/31/2022
01	01/3/2020	TBD	Contract #091218-NAF, Sourewell	72 Hour LLC, DBA National Auto Fleet Group	Auto Fleet	10/19/2018 - 10/19/2022
01	01/14/2020	TBD	CMAS Contract: 4-15-58-0075A	Troxell Communications	Audio Visual Installation	10/16/2017 - 07/31/2022

SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION

AGENDA ITEM: G -3
MEETING DATE: 01/28/2020

APPROVED: KS KK
Kent Stephens

Business and Financial Report

The following reports are submitted for board approval/ratification:

	Inc	Page #
Easements/Leases		
Notices of Completion	✔	1
Quarterly Investment Report		
Warrants & Payroll	✔	2
Budget Revisions		
E-Rate		
ERRATA		

Notices of Completion - Board of Education

CONTRACTOR	PROJECT	DATE OF ACCEPTANCE	DATE RECORDED
Buskirk Construction	PO#907572 Provide all labor, materials, equipment, tools, transportation and incidentals to renovate the Administration Building at Del Campo High School, 4925 Dewey Drive, Fair Oaks, CA 95628 located in the San Juan Unified School District, Sacramento, CA Vendor: Buskirk Construction	11/15/2019	12/26/2019

SAN JUAN UNIFIED SCHOOL DISTRICT
Accounting Services

WARRANTS & PAYROLL

VENDOR AND CONTRACT WARRANTS		
Fund		**December 2019**
01	General Fund	$ 5,903,649.33
09	Charter Schools	17,186.37
10	Special Ed Pass-Thru	297,708.21
11	Adult Education	24,208.56
12	Child Development	77,141.51
13	Food Service/Cafeteria	454,316.38
14	Deferred Maintenance	24,189.97
21	Building Fund	31,323.59
22	Measure S Building Fund	500.00
23	Measure J Building Fund	2,416,549.56
24	Measure N Building Fund	8,846,640.57
25	Capital Facilities	17,552.00
26	Measure P Building Fund	3,641,569.38
35	State Schools Facilities Fund	-
40	Sp Res FD -- Capital Outlay Proj	-
67	Self Insurance	1,216,862.20
95	Student Body	-
	TOTALS	**$ 22,969,397.63**

PAYROLL AND BENEFITS	
All Funds	**December 2019**
Certificated Payroll	$ 19,737,928.30
Classified Payroll	7,456,931.15
Benefits	12,855,699.51
TOTALS	**$ 40,050,558.96**

GRAND TOTAL $ 63,019,956.59

SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION

AGENDA ITEM: G-5

MEETING DATE: 01/28/2020

SUBJECT: Surplus Property

CHECK ONE:
For Discussion: ☐
For Action: ☒
Report: ☐
Workshop: ☐
Recognition: ☐
Emergency Action: ☐

DEPARTMENT: Business Support Services

ACTION REQUESTED:
The superintendent is recommending that the board approve the disposal of surplus property pursuant to Board Policy 3270.

RATIONALE/BACKGROUND:
The Governing Board recognizes that the district may own personal property which is unusable, obsolete, or no longer needed by the district. The superintendent or designee shall arrange for the sale or disposal of district personal property in accordance with board policy and the requirements or state law.

The superintendent or designee shall identify to the board all items not needed by the district together with their estimated value and a recommended disposition.

ATTACHMENT(S):
A: List of Surplus Property

BOARD COMMITTEE ACTION/COMMENT:
N/A

PREVIOUS STAFF/BOARD ACTION:
Superintendent's Cabinet: 01/21/2020

FISCAL IMPACT:
Current Budget: $ N/A
Additional Budget: $ N/A
Funding Source: N/A
(Unrestricted Base, Supplemental, other restricted, etc.)
Current Year Only ☐ On-going ☐

LCAP/STRATEGIC PLAN:
Goal: N/A Focus: N/A
Action: N/A
Strategic Plan: N/A

PREPARED BY: Susan Kane, Interim Director, Business Support Services
Kent Stephens, Deputy Superintendent KS

APPROVED BY: Kent Kern, Superintendent of Schools KK

Attachment A

Board of Education Agenda Item
Surplus Property January 28th Meeting Date

The following District property is unusable, obsolete, or no longer needed. The items are to be disposed of by sale, recycled, donated, or discarded as required by Board Policy 3270 Education Code 17545 and 17546.

Location/Site	Make	Model	Description	Serial #	Disposition
Arcade			33 Boxes of instructional materials		Recycled
Arden			2 Boxes of instructional materials		Recycled
Business Support Services			1 Lot - Fixed Asset sweep under $5,000 + over 10 years old		various/Ewaste
Encina			2 Class sets of student desks and chairs		Recycled
Howe Ave	DELL		Mouse	PID: HS8241608EU	Ewaste
Howe Ave	KYOCERA	COPYSTAR CS221	Stand up printer	MACHINE NO. QNM0300706	Ewaste
Howe Ave	HP	WINDOWS 7 PRO OA	Desktop hard drive	MXL0290F9S	Ewaste
Howe Ave	HP	LE2001w	20" LCD computer monitor	CNT021DCS7	Ewaste
Howe Ave	HP	HP LASERJET 1022	Desktop printer	VNB3S51803	Ewaste
Howe Ave			Washer		Ewaste
Howe Ave			Dryer		Ewaste
Howe Ave			File cabinet		Recycled
Howe Ave			Stage risers		Recycled
Ralph Richardson			Mounting arms, power cords		Ewaste
Ralph Richardson	HP		Printer	TH75U544H2	Ewaste
Ralph Richardson			Radio	3125687	Ewaste
Ralph Richardson			Projector	WPRM-250111164	Ewaste
Ralph Richardson			Projector	WPRM-250220497	Ewaste
Ralph Richardson			Projector	WPRM-250225463	Ewaste
Ralph Richardson			Projector	WPRM-250111159	Ewaste
Ralph Richardson			Projector	WPRM-250080807	Ewaste
Ralph Richardson			Projector	68Y20096	Ewaste
Ralph Richardson			Projector	6BY20106	Ewaste
Ralph Richardson			Projector	NMB-003 (Rm 18)	Ewaste
Ralph Richardson			Projector	WPRM-20188076	Ewaste
Ralph Richardson			Promethean board	20194819	Ewaste
Ralph Richardson			Promethean board	20194790	Ewaste
Ralph Richardson			Promethean board	20194791	Ewaste
Ralph Richardson			Promethean board	20186886	Ewaste
Ralph Richardson			Promethean board	20194830	Ewaste
Ralph Richardson			Promethean board	20194803	Ewaste
Ralph Richardson			Promethean board	20194821	Ewaste
Twin Lakes			20 - Student desks, 6 - Tables, 2 - File cabinets, Student chairs, 3 - Computer stands		Recycled

SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION

AGENDA ITEM: **G-6**

MEETING DATE: **01/28/2020**

SUBJECT: 2018-19 School Accountability Report Cards (SARCs)

CHECK ONE:
For Discussion: ☐
For Action: ☒
Report: ☐
Workshop: ☐
Recognition: ☐
Emergency Action: ☐

DEPARTMENT: Division of Teaching and Learning

ACTION REQUESTED:
The superintendent is recommending that the board approve the 2018-19 School Accountability Report Cards (SARCs) for San Juan Unified School District schools.

RATIONALE/BACKGROUND:
Since November 1988, state law has required all public schools receiving state funding to prepare and distribute a SARC. The purpose of the report card is to provide parents and the community with important information about each public school including its progress in achieving goals. The public may also use a SARC to evaluate and compare schools on a variety of indicators. SARCs being published in 2019-20 contain data from the 2018-19 school year. SARC information includes a school profile, mission statement, demographic data, school safety and climate for learning information, academic data (overall state test results and disaggregated by groups), federal and state accountability status, school completion rates, class sizes, teacher and staff information, curriculum and instruction descriptions, and fiscal and expenditure data. As we transition from the federal No Child Left Behind (NCLB) Act to the Every Student Succeeds Act (ESSA), the SARC will remain in its current form until altered by legislation.

SARCs are updated annually and posted by February 1. Translated SARCs are made available for schools where 15% or more of the families speak a language other than English. In San Juan, SARCs can be accessed on the website for each school under Our School by selecting Assessment Data. SARCs for each school can also be accessed from the following page: www.sanjuan.edu/Page/660.

ATTACHMENT(S):
N/A

BOARD COMMITTEE ACTION/COMMENT:
N/A

PREVIOUS STAFF/BOARD ACTION:
Superintendent's Cabinet: 01/21/2020

FISCAL IMPACT:
Current budget year: $ 9,238
Additional Budget: $ N/A
Funding Source: AEP General
(Unrestricted Base, Supplemental, other restricted, etc.)
Current Year Only ☐ On-going ☒

LCAP/STRATEGIC PLAN:
Goal: 8 Focus: N/A
Action: N/A
Strategic Plan: N/A

PREPARED BY: Susan Green, Director, Assessment, Evaluation, and Planning

APPROVED BY: Kristan Schnepp, Senior Director, Professional Learning and Innovation *KS*
Melissa Bassanelli, Deputy Superintendent, Schools and Student Support MB
Kent Kern, Superintendent of Schools KK

SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION

AGENDA ITEM: **G-7**

MEETING DATE: **01/28/2020**

SUBJECT: Lease Amendment for Storage Space for District Surplus Furniture

DEPARTMENT: Facilities

CHECK ONE:

For Discussion:	☐
For Action:	☒
Report:	☐
Workshop:	☐
Recognition:	☐
Emergency Action:	☐

ACTION REQUESTED:
The superintendent is recommending that the board approve the lease amendment for storage space at 6240 San Juan Avenue, Citrus Heights, California.

RATIONALE/BACKGROUND:
The San Juan Unified School District has the need for additional storage space that we do not currently have in the district, for district surplus furniture due to bond construction projects.

ATTACHMENT(S):
A: First Amendment to Lease Agreement

BOARD COMMITTEE ACTION/COMMENT:
N/A

PREVIOUS STAFF/BOARD ACTION:
Superintendent's Cabinet: 01/21/2020

FISCAL IMPACT:
Current Budget: N/A
Additional Budget: $ N/A
Funding Source: Measure P
(unrestricted base, supplemental, other restricted, etc.)
Current Year Only ☐ Ongoing ☐

LCAP/STRATEGIC PLAN:
Goal: N/A Focus: N/A
Action: N/A

Strategic Plan: N/A

PREPARED BY: Frank Camarda, Assistant Superintendent of Operations, Facilities and Transportation

APPROVED BY: Kent Kern, Superintendent of Schools

FIRST AMENDMENT TO LEASE AGREEMENT

This First Amendment to Lease Agreement ("First Amendment") is entered this 30th day of December 2019, by and between **Allan A. Sebanc and Beverly M. Sebanc Family Trust, and Kenneth McCloskey, an individual** ("collectively "Lessors") and the **San Juan Unified School District** ("Lessee"), collectively referred to as the ("Parties").

WHEREAS, Lessee entered into that certain Lease Agreement dated February 13, 2019, pertaining to that certain premise located at **6240 San Juan Avenue, Suite I, in the City of Citrus Heights, State of California**, the "Premises"; and

WHEREAS, Lessee desires to extend the Original Term of the Lease upon the terms and conditions set forth below in this First Amendment and Lessor is agreeable to such extension.

NOWTHEREFORE, in consideration of the covenants contained herein, the Parties hereto agree to the amendment and modification as follows:

1. Lease Extension Period:

The term of the Lease shall be extended for the further term of one (1) year commencing on March 1, 2020 and expiring on February 28, 2021, under the same terms, covenants and conditions as set forth in the Lease, as defined above. Lessee shall have no other right to extend this Lease beyond this further term of one (1) year as set forth in this paragraph.

The base rent during the extended term of one (1) year shall be as follows:

March 1, 2020 – February 28, 2021 $5,610.00 per month, GROSS

Except as herein modified, the Original Lease dated February 13, 2019 shall remain in full force and effect.

IN WITNESS WHEREOF, the Parties hereto have executed and acknowledged this First Amendment to Lease.

LESSOR:
ALLAN A SEBANC and BEVERLY M. SEBANC FAMILY TRUST, and KENNETH McCLOSKEY

By: _____
Allan A. Sebanc

By: _____
Beverly M. Sebanc

By: _____
Kenneth McCloskey

Dated: _____

LESSEE:
SAN JUAN UNIFIED SCHOOL DISTRICT

By: _____
Frank Camarda, Assistant Superintendent of Operations, Facilities & Transportation

Dated: _____

SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION

AGENDA ITEM: ___G-8____

MEETING DATE: 01/28/2020

SUBJECT: Agreement for Sale of Real Property to the Sylvan Cemetery District

DEPARTMENT: Facilities

CHECK ONE:
For Discussion: ☐
For Action: ☒
Report: ☐
Workshop: ☐
Recognition: ☐
Emergency Action: ☐

ACTION REQUESTED:
The superintendent is recommending that the board approve the agreement for the sale of real property between the Sylvan Cemetery District and San Juan Unified School District (SJUSD) for the 0.08 acre of property located in Citrus Heights, California 95610.

RATIONALE/BACKGROUND:
The district and the Sylvan Cemetery District are parties to a certain agreement for sale of real property between the Sylvan Cemetery District and SJUSD (the "Agreement") for the 0.08 acre of property located in Citrus Heights, California 95610.

ATTACHMENT(S):
A: Agreement for Purchase and Sale of Real Property

BOARD COMMITTEE ACTION/COMMENT:
N/A

PREVIOUS STAFF/BOARD ACTION:
Superintendent's Cabinet: 01/21/2020

FISCAL IMPACT:
Current Budget: $N/A
Additional Budget: $ N/A
Funding Source: N/A
(unrestricted base, supplemental, other restricted, etc.)
Current Year Only ☐ Ongoing ☐

LCAP/STRATEGIC PLAN:
Goal: N/A Focus: N/A
Action: N/A

Strategic Plan: N/A

PREPARED BY: Frank Camarda, Assistant Superintendent, Operations, Facilities and Transportation

APPROVED BY: Kent Kern, Superintendent of Schools

AGREEMENT FOR PURCHASE AND SALE OF REAL PROPERTY

This Agreement for Purchase and Sale of Real Property ("Agreement") is entered into as of December 20, 2019 ("Effective Date") between the SAN JUAN UNIFIED SCHOOL DISTRICT ("Seller"), and the SYLVAN CEMETERY DISTRICT ("Buyer"). Buyer and Seller may also be referred to in this Agreement singularly as a "Party" and collectively as the "Parties."

RECITALS

A. Seller is the current fee owner of approximately .08 acres of real property located in Sacramento County, California, a portion of the property formerly used as the Sylvan Middle School site, as more specifically described in Exhibits A, attached, which shall be referred herein as the "Property."

B. Buyer is a cemetery district with an existing cemetery ("Cemetery") adjacent to the Property.

C. The Cemetery's uses, including a road for ingress and egress, encroach upon the Property.

D. Seller proposes to sell the Property to Buyer.

E. Buyer determined that it desires to purchase the Property from Buyer.

The Parties therefore agree as follows:

ARTICLE 1
PURCHASE AND SALE

1.1 Purchase and Sale of the Property

Subject to the terms and conditions that follow, Seller shall sell to Buyer, and Buyer shall purchase the (i) Property, together with any improvements located thereon, (ii) all easements, licenses, interests, privileges, rights and appurtenances owned or held by Seller relating to the Property, including but not limited to all minerals, oil, gas and other hydrocarbon substances located thereon, all development rights, air rights water, water right and water stock relating to the Property, and (iii) any and all permits, certificates of occupancy, development agreements, warranties, licenses and other rights owned by Seller with respect to the ownership or operation of the land. The Property shall be sold "AS IS."

1.2 Purchase Price

(A) The purchase price for the Property ("Purchase Price") shall be One-Hundred and 00/100 Cents ($100.00).

(B) Buyer shall also pay the approximate cost of the legal fees incurred by Seller as a result of the encroachment, in the amount of Four Thousand One Hundred Fifty-Nine and 50/100 ($4,159.50). Collectively with the Purchase Price, the total

purchase price for the Property shall be Four Thousand Two Hundred Fifty-Nine and 50/100 Cents ($4,259.50") ("Total Purchase Price").

(C) Buyer will pay the Total Purchase Price to Seller on the following terms and conditions:

(1) Title to the Property shall be conveyed by the Seller to the Buyer by a fully executed and notarized grant deed for the Property ("Grant Deed") in the form attached as Exhibit B. Buyer shall accept the Grant Deed using the Certificate of Acceptance in the form attached as Exhibit C.

ARTICLE 2
REPRESENTATIONS AND WARRANTIES

2.1 Seller's Representations and Warranties

(A) As the Cemetery's uses encroach upon the Property, and the Property is and has been under the effective control of the Buyer, the Property is being sold As-Is with no representations or warranties by Seller, other than that provided in Sections 2.1(B) and 2.1(C).

(B) *Full Power and Authority*

Neither this Agreement nor anything provided to be done hereunder including the transfer of title to the Property to Buyer violates or shall violate any contract, agreement or instrument to which Seller is a party. Seller has the full power and authority to enter into this Agreement and consummate the transaction contemplated hereby. The execution, delivery and performance of this Agreement has been duly and validly authorized by Seller upon approval by Seller's Board of Trustees, and no other action by Seller is requisite to the valid and binding execution, delivery, and performance of this Agreement by Seller. Seller is not prohibited from consummating the transaction contemplated in this Agreement by any law, regulation, agreement, instrument, restriction, order or judgment.

(C) *Notices*

Seller has made all disclosures and provided all notices to Buyer which are required by Section 25359.7 of the California Health and Safety Code.

2.2 Buyer's Representations and Warranties

(A) As the Cemetery's uses encroach upon the Property, and the Property is and has been under the effective control of the Buyer, the Property is being sold As-Is with no representations or warranties by Buyer, except as provided in Section 2.2(B).

(B) *Full Power and Authority*

Neither this Agreement nor anything provided to be done hereunder including the transfer of title to the Property to Buyer, violates or shall violate any contract, agreement or instrument to which Buyer is a party. Buyer has the full power and authority to enter into this Agreement and consummate the transaction contemplated hereby. The execution, delivery and performance of this Agreement will have been duly and validly authorized by Buyer upon ratification or approval by Buyer's Board of Trustees, and no other action by Buyer is requisite to the valid and binding execution, delivery, and performance of this Agreement by Buyer.

CONDITIONS PRECEDENT

3.1 Conditions Precedent to Transfer of Title

The obligation of the Buyer and the Seller to complete this transaction pursuant to this Agreement is subject to the satisfaction, at or before the transfer of title, of the conditions contained herein. The Buyer and the Seller agree that each will, in good faith, endeavor to remove all said contingencies and conditions that are within its control. The following are conditions precedent to the transfer of title:

(A) The Buyer must pay the Total Purchase Price to the Seller;

(B) The Seller must have provided Buyer with two (2) signed-originals of this Agreement;

(C) The Seller's Board of Education shall have ratified this Agreement;

(D) The Buyer's Board of Trustees shall have approved or ratified this Agreement; and

(E) Seller and Buyer must not be in breach or default of any of their respective obligations under this Agreement.

ARTICLE 4
TRANSFER OF TITLE PROVISIONS

4.1 Signing of Other Documents; Compliance with Regulations

The Parties will do all things and sign all documents that are reasonably necessary for transfer of title to occur. Furthermore, the Parties will comply with all applicable laws and governmental regulations required for transfer of title to occur, including, but not limited to, any required filings with governmental authorities.

4.2 Costs

Buyer shall pay any fees, documentary transfer taxes, or any other costs associated with transfer of title. If fees or other costs are incurred by Seller, Buyer shall reimburse Seller for such fees and costs within seven (7) days of Seller's demand for reimbursement.

ARTICLE 5
NOTICES

5.1 Notices

All notices under this Agreement must be in writing. All notices must be sent with postage fully prepaid and be addressed to the respective Parties as set forth below or to other addresses and persons as the Parties may designate by written notice to the other Parties. The Notices will be effective:

(A) When personally delivered by the other Party or messenger or courier of the other Party;

(B) Three (3)-business days after deposit in the United States mail, registered or certified;

(C) Twenty four (24) hours after deposit before the daily deadline time with a reputable overnight courier or service; or

(D) On receipt of a telecopy or fax transmission, if a hard copy of the transmission is thereafter delivered in one of the methods described in (A) through (C) above. However, facsimiles sent after 5:00 p.m. PST, or PDT as applicable, are considered to have been sent the next business day.

TO THE SELLER:

SAN JUAN UNIFIED SCHOOL DISTRICT
3738 Walnut Avenue
Carmichael, CA 95608
Telephone: (916) 971-5740
Attention: Frank Camarda, Assistant Superintendent

with copy to:

LOZANO SMITH, LLP
One Capitol Mall, Suite 640
Sacramento, California 95814
Telephone: (916) 329-7433
Facsimile: (916) 329-9050
Attention: Megan Macy

TO THE BUYER:

SYLVAN CEMETERY DISTRICT
7401 Auburn Blvd.
Citrus Heights, CA 95610
Telephone: (916) 725-3406
Attention: _____

ARTICLE 6
MISCELLANEOUS PROVISIONS

6.1 Entire Agreement, Waivers, and Amendments

This Agreement supersedes all negotiations and previous agreements between the Parties related to the purchase and sale of the Property. All waivers of the provisions of this Agreement must be in writing and signed by the appropriate authorities of the Party to be charged. Any amendment or modification to this Agreement must be in writing and executed by both Parties.

6.2 Exhibits

Exhibits "A," "B," "C" and "D" attached to this Agreement are incorporated into this Agreement by this reference. The Exhibits are as follows:

"A" - LEGAL DESCRIPTION OF PROPERTY PURCHASED BY BUYER

"B" - DIAGRAM OF PROPERTY PURCHASED BY BUYER

"C" - GRANT DEED

"D" - PUBLIC AGENCY CERTIFICATE OF ACCEPTANCE

6.3 Effect of Recitals

The Recitals shown above are considered true and are binding on Seller and Buyer.

6.4 Section References

Any reference to any Section of this Agreement cited without a decimal includes all Sections following the cited Section. For example, a reference to Section 5 includes 5.1, 5.1(a), et seq.

6.5 Transfer of Title Costs

Buyer shall be responsible for its own costs incurred, including legal costs, related to this Agreement and the transfer of title of the Property, except as expressly set forth in Section 1.2.

6.6 Legal Action

If a dispute arises relating to this Agreement, the Parties shall first attempt to resolve it through informal discussions. Any Party may convene such discussions by written notice, and each Party shall reasonably accommodate the other Party with respect to scheduling.

6.7 Attorney's Fees and Costs

In the event of any legal proceeding arising out of or relating to this Agreement, the parties hereto shall bear their own attorneys' fees and costs.

6.8 Third-Party Beneficiaries

This Agreement confers no rights on any party except the signatories to this Agreement.

6.9 Binding on Heirs

This Agreement is binding on the Parties hereto and their respective heirs or representatives, and their permitted transferees, successors, and assigns.

6.10 Assignment

Neither Party shall have the right to transfer or assign any of its rights or obligations under this Agreement without the prior written consent of the other Party. Further, Seller may only assign this Agreement to another entity and be relieved of all liability or responsibility under this Agreement, provided that such assignee fully assumes all of Seller's obligations hereunder in a writing approved and duly executed by the Buyer and the assignee, and only where the assignee demonstrates to the satisfaction of the Buyer its capability, both financial and practical, to properly and fully complete and perform all obligations hereunder; otherwise Seller will retain all obligations.

6.11 Obligations Survive Transfer of Title

All obligations to be performed at a time after the transfer of title, whether specifically referred to as surviving the Close of Escrow or not, and all covenants, representations and warranties of the Parties, will survive the transfer of title.

6.12 Severability

If a court of competent jurisdiction holds any provision in this Agreement to be invalid or unenforceable, the remaining provisions will nevertheless continue in full force without being impaired in any way.

6.13 Governing Law

This Agreement must be construed according to its fair meaning and as if prepared by both Buyer and Seller. This Agreement must be construed in accordance with the laws of

the State of California in effect on the Effective Date. Any action or proceeding seeking any relief under or with respect to this Agreement shall be brought solely in the Superior Court of the State of California for the County of Sacramento.

6.14 Time is of the Essence

Time is of the essence in this Agreement.

6.16 Headings

Headings at the beginning of each Article and Section are solely for the convenience of the Parties and must not to be construed as enlarging or limiting the language following the headings.

6.17 Nondiscrimination

Buyer and Seller must not discriminate against any person because of race, color, religion, sex, marital status, national origin, or ancestry in the performance of their respective obligations under this Agreement.

6.18 Rights and Remedies are Cumulative

Unless stated otherwise in this Agreement, the rights and remedies of the Parties are cumulative. A Party's exercise of any of its right or remedies will not preclude its exercise, at the same or at different times, of any other rights or remedies for the same, or any other default.

6.19 Cooperation

Seller must provide Buyer, without demand, copies of all planning, engineering, architectural and other project documents, and all modifications to those documents, relating to the Property.

6.20 Possession of Property

Subject to the provisions of the Site Lease, the Parties agree that Buyer may take possession of the Property for all purposes immediately following the transfer of title.

6.21 Business Days

In this Agreement; "business days" means days other than Saturdays, Sundays, and federal and state legal holidays, and "days" means calendar days. If the time for performance of an obligation under this Agreement falls on other than a business day, the time for performance shall be extended to the next business day.

6.22 Force Majeure

No Party shall be deemed to be in default where failure or delay in the performance of any of its obligations under this Agreement is caused by floods, earthquakes, other acts of

God, fires, wars, terrorism, riots or similar hostilities, strikes and other labor difficulties beyond a Party's control, shortage of materials (exclusive of prefab/modular building products), prohibitory court actions (such as restraining orders or injunctions) or other causes beyond a Party's control. If any such events shall occur, the time for performance by any Party of its obligations hereunder shall be extended for the period of time that such events prevented such performance.

6.23 Facsimile Signatures

Signatures delivered by facsimile shall be as binding as originals upon the Parties so signing and delivering, provided that original signatures are provided no later than five (5) business days after delivery of the facsimile signature. This Agreement may be executed in counterparts, each of which shall constitute an original of the Agreement.

6.24 Successors and Assigns

Subject to compliance with the assignment provisions of Section 6.10 above, the provisions of this Agreement shall inure to the benefit of and likewise be binding upon each of the Party's successors and/or assigns, if any.

* *

BUYER: **SYLVAN CEMETERY DISTRICT**

By: _____
[Authorized Officer]

SELLER: **SAN JUAN UNIFIED SCHOOL DISTRICT**

By: _____
Superintendent

EXHIBIT A
LEGAL DESCRIPTION
NEW LEGAL DESCRIPTION OF SYLVAN CEMETERY
PAGE 1 OF 1

BEING LOCATED IN THE CITY OF CITRUS HEIGHTS AND BEING ALL THAT PORTION OF THE NORTHWEST ONE-QUARTER (1/4) OF SECTION 26, TOWNSHIP 10 NORTH, RANGE 6 EAST M.D.M., AND BEING A PORTION OF THAT CERTAIN RECORD OF SURVEY FILED IN BOOK 91 OF SURVEYS AT PAGE 10 AND THAT RECORD OF SURVEY FILED IN BOOK 18 OF SURVEYS AT PAGE 25 ON FILE IN THE OFFICE OF THE RECORDER, COUNTY OF SACRAMENTO, STATE OF CALIFORNIA;

BEING DESCRIBED AS FOLLOWS:

ALL OF RECORD OF SURVEY AS RECORDED IN BOOK 18 OF SURVEYS AT PAGE 25 TOGETHER WITH A PORTION OF THAT CERTAIN RECORD OF SURVEY FILED IN BOOK 91 OF SURVEYS AT PAGE 10 BEING DESCRIBED AS FOLLOWS:

TRANSFER AREA FROM SYLVAN SCHOOL TO SYLVAN CEMETERY

BEGINNING AT THE NORTHEAST CORNER OF RECORD OF SURVEY IN BOOK 91 PAGE 10, BEING COMMON TO THE SOUTHEAST CORNER OF THE RECORD OF SURVEY IN BOOK 18 AT PAGE 25, SAID POINT BEING ON THE WESTERLY RIGHT OF WAY OF AUBURN BOULEVARD.

THENCE FROM SAID POINT OF BEGINNING THE FOLLOWING NINE (9) COURSES:

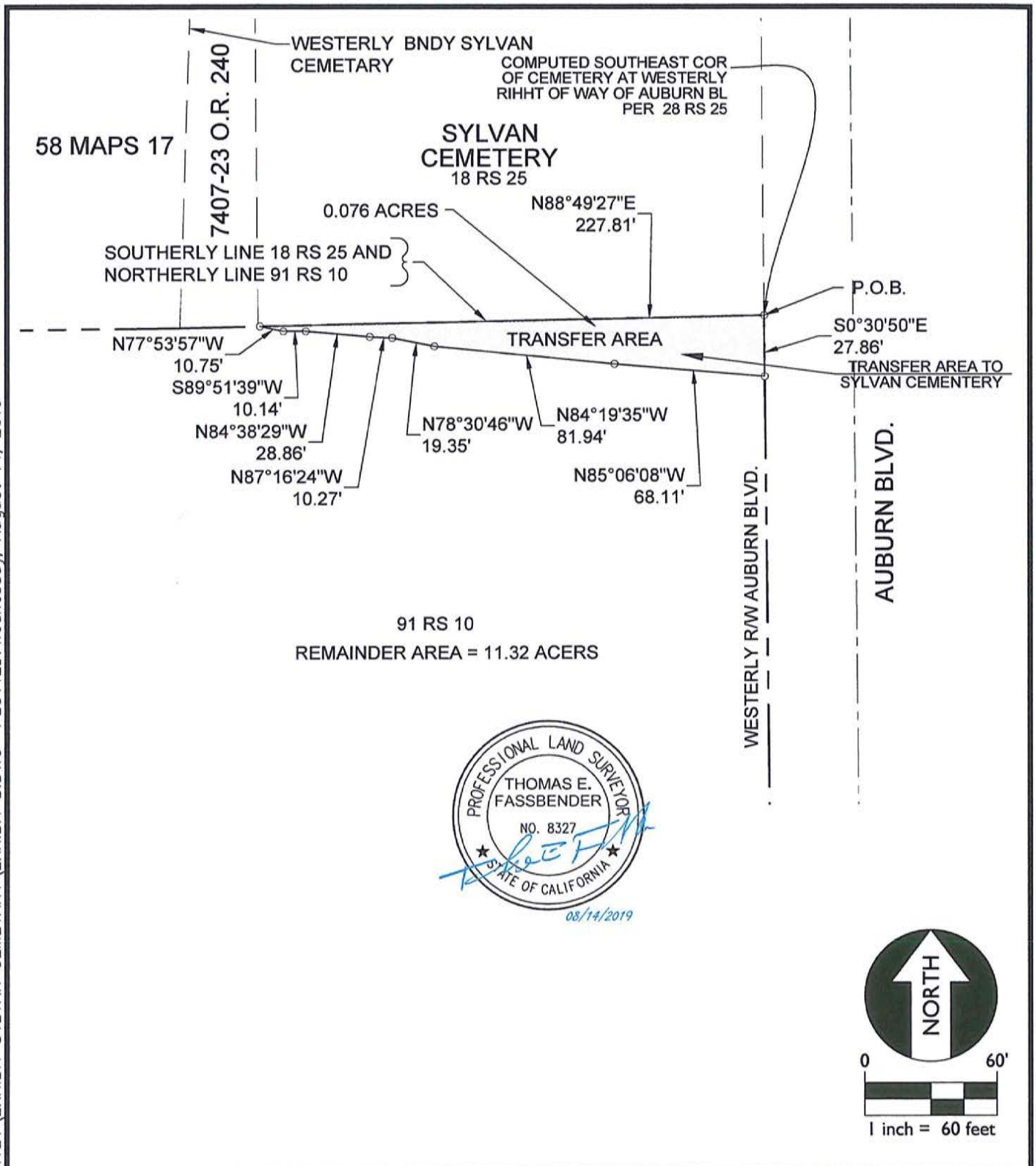
1. ALONG THE WESTERLY RIGHT OF WAY OF AUBURN BOULEVARD SOUTH 00°30'50" EAST 27.86 FEET;
2. LEAVING SAID RIGHT OF WAY NORTH 85°06'08" WEST 68.11 FEET;
3. NORTH 84°19'35" WEST 81.94 FEET;
4. NORTH 78°30'46" WEST 19.35 FEET;
5. NORTH 87°16'24" WEST 10.27 FEET;
6. NORTH 84°38'29" WEST 28.86 FEET;
7. SOUTH 89°51'39" WEST 10.14 FEET;
8. NORTH 77°53'57" WEST 10.75 FEET TO A POINT ON THE COMMON LINE BETWEEN RECORD OF SURVEY IN BOOK 91 AT PAGE 10;
9. ALONG SAID COMMON LINE NORTH 88°49'27: EAST 227.81 FEET TO THE POINT OF BEGINNING.

TRANSFER AREA CONTAINING: 3321 SQUARE FEET OR 0.08 ACRES +/-
BASIS OF BEARING FOR THIS DESCRIPTION IS IDENTICAL TO THAT CERTAIN RECORD OF SURVEY FILED IN BOOK 91 OF SURVEYS AT PAGE 10 ON FILE IN THE OFFICE OF THE RECORDER, COUNTY OF SACRAMENTO, STATE OF CALIFORNIA.

END OF DESCRIPTION

PREPARED BY: WARREN CONSULTING ENGINEERS, INC.
1117 WINDFIELD WAY, STE. 110
EL DORADO HILLS, CA 95762





FILENAME: I:\19-114\SURVEY\EXHIBIT SYLVAN CEMETARY\EXHIBIT B.DWG PLOTTED: Wednesday, August 14, 2019

WARREN CONSULTING ENGINEERS, INC.
1117 WINDFIELD WAY, SUITE 110
EL DORADO HILLS, CA 95762 | (916) 985-1870

Title: BLA - TRANSFER AREA		Ref: -	
Project: SYLVAN MIDDLE SCHOOL		Job No: 19-114	Sheet No. EX B
		Scale: 1"=60'	
		Date: 8/13/19	

EXHIBIT C

FORM OF GRANT DEED

RECORDING REQUESTED BY AND
WHEN RECORDED MAIL TO:

LOZANO SMITH
Attn: Megan Macy
1 Capitol Mall, Ste 640
Sacramento, CA 95814
Telephone: (916) 329-7433

MAIL TAX STATEMENTS TO:

Same as above

Recording of this document is fee-exempt under Government Code Section 6103. No Documentary Transfer Tax is due on this document pursuant to Revenue and Taxation Code Section 11922.

GRANT DEED

FOR VALUABLE CONSIDERATION, receipt of which is hereby acknowledged, the undersigned, SAN JUAN UNIFIED SCHOOL DISTRICT ("Grantor"), hereby grants to SYLVAN CEMETERY DISTRICT, a public cemetery district duly organized and existing under the laws of the State of California ("Grantee"), that certain real property in the City of Citrus Heights, County of Sacramento, State of California described in Exhibit A to Grant Deed attached hereto and incorporated herein, together with all buildings and improvements located thereon, subject to any covenants, conditions, restrictions, easements and other matters of record (the "Property").

In witness whereof, Grantor has caused this Grant Deed to be executed as of the _____ day of _____, 2019.

GRANTOR:

SELLER: **SAN JUAN UNIFIED SCHOOL DISTRICT**

By: _____

[Name, Title]

MAIL TAX STATEMENTS AS SET FORTH ABOVE

A Notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached and not the truthfulness, accuracy, or validity of that document.

STATE OF CALIFORNIA

COUNTY OF _____

On _____, 2019 before me, _____ [Name of Notary Public], personally appeared _____, personally known to me (or proved to me on the basis of satisfactory evidence) to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

WITNESS my hand and official seal.

_____

Notary Public [SEAL]

Exhibit A to Grant Deed

EXHIBIT D

FORM OF CERTIFICATE OF ACCEPTANCE OF DEDICATION

This is to certify that the interest in real property conveyed by the Grant Deed dated December 20, 2019, from SAN JUAN UNIFIED SCHOOL DISTRICT, a school district duly organized and existing under the laws of the State of California, to the SYLVAN CEMETERY DISTRICT, a public cemetery district duly organized and existing under the laws of the State of California, is hereby accepted by the undersigned officer on behalf of the SYLVAN CEMETERY DISTRICT pursuant to authority conferred by the California Constitution and California Government Code, and the SYLVAN CEMETERY DISTRICT consents to the recordation thereof by its duly authorized officer.

Dated: December 20, 2019

"BUYER"
SYLVAN CEMETERY DISTRICT,
a political subdivision of the State of California

By: _____
Name: Jim Monteton
Its: Board of Trustees, Chairman

SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION

AGENDA ITEM: **I-1**

MEETING DATE: **01/28/2020**

SUBJECT: Continuous Improvement Series:
Social Emotional Learning (SEL)

CHECK ONE:
For Discussion: ☐
For Action: ☐
Report: ☒
Workshop: ☐
Recognition: ☐
Emergency Action: ☐

DEPARTMENT: Division of Teaching and Learning

ACTION REQUESTED:
The superintendent is recommending the board receive an update from the Division of Teaching and Learning regarding SEL through a lens of continuous improvement in the district.

RATIONALE/BACKGROUND:
The purpose of this report is to update the board on the district's progress toward integration of SEL for all students. SEL is the process through which children and adults understand and manage emotions, set and achieve positive goals, feel and show empathy for others, establish and maintain positive relationships and make responsible decisions. While SEL competencies are often referred to as "soft skills," studies continue to show SEL has a direct, positive impact on academic and behavioral success in school. The district has been working to integrate SEL to create and expand opportunities for all students.

Through a lens of continuous improvement, the goal of this presentation is to provide a background on SEL, examine how the district is currently measuring SEL with data, detail the variety of ways SEL is integrated within district frameworks and school programs and discuss the next steps based on current progress in these areas.

ATTACHMENT(S):
A: Presentation
B: Integrating SEL and District Initiatives
C: California Department of Education (CDE) SEL Guiding Principles
D: Implementation Rubric for SEL

BOARD COMMITTEE ACTION/COMMENT:
N/A

PREVIOUS STAFF/BOARD ACTION:
Superintendent's Cabinet: 01/21/2020

FISCAL IMPACT:
Current Budget: $ N/A

Additional Budget: $ N/A
Funding Source: N/A
Current Year Only ☐ On-going ☐

LCAP/STRATEGIC PLAN:
Goal: 1 Focus: 4, 5, 6, 7
Goal: 2 Focus: 1-5

Strategic Plan: 1, 2, 4

PREPARED BY: Dominic Covello, Director, Student Support Services
Susan Green, Director, Assessment, Evaluation and Planning

APPROVED BY: Debra Calvin, Ed.D., Assistant Superintendent, Educational Services DC
Melissa Bassanelli, Deputy Superintendent, Schools and Student Support MB
Kent Kern, Superintendent of Schools KK

San Juan Unified School District

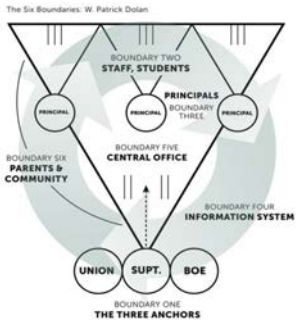
Social Emotional Learning (SEL): Increasing Access, Instruction and Supports through Continuous Improvement

San Juan Unified School District

January 28, 2020

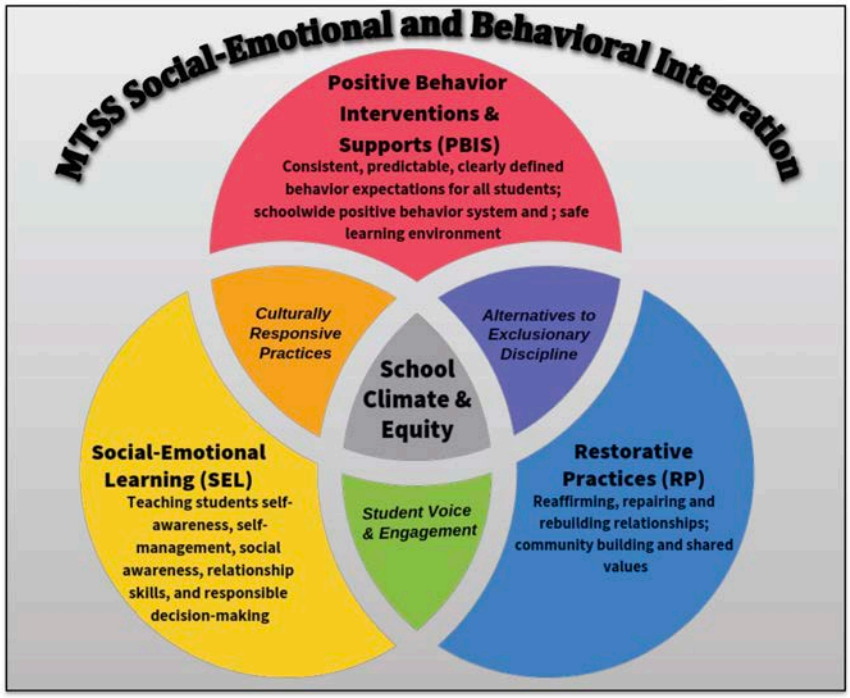
Debra Calvin, Ed.D., Assistant Superintendent, Educational Services
Dominic Covello, Director, Student Support Services
Loretta Moreland, Teacher, Lichen K-8 School
Steve Weaver, School Social Worker

Through a Continuous Improvement Process ...



What are the ways we can leverage and build upon our collaborative culture to create a system of continuous improvement in which we listen to, learn from and respond to the needs of students, practitioners and community members?

2



3

San Juan Unified School District

What is SEL?

Research has shown that students need more than academic knowledge to do well in school — they must also be able to work with others, understand and manage their emotions and set and achieve goals. These abilities, also known as SEL competencies, are critical for improving students' academic achievement, decreasing problem behaviors and increasing students' college and career readiness.

(Hanover, 2017)

Character Education

MTSS ALL MEANS ALL

SOCIAL EMOTIONAL LEARNING

Restorative Practices

PBIS

Wellbeing

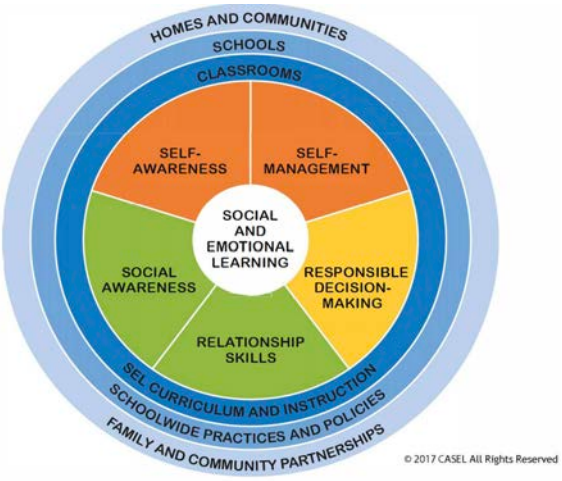
Bullying

4

San Juan Unified School District

SEL Competencies

While there are many ways to define SEL, the Collaborative for Academic, Social and Emotional Learning (CASEL) has developed a commonly used framework that includes five key competencies:



5

SEL Outcomes

Research has demonstrated multiple benefits for promoting SEL:

Social Emotional Learning

- Increased Academic Performance
- Improved Attitudes and Behaviors
- Reduced Emotional Distress
- Decreased Drug and Alcohol Use
- Fewer Negative Behaviors

(Durlak, 2011) (Taylor, 2017)

6

Current District Level SEL Opportunities and Integration

SEL Opportunities

- State/districtwide focus on chronic absenteeism and suspension rates
- Site requests: Positive Behavioral Interventions and Supports (PBIS), Restorative Practices (RP) trainings, additional social emotional support staff
- Grant funding for SEL related programs
- Student engagement and voice through youth leadership groups
- Local Control Accountability Plan (LCAP) listening networks and strategic planning goals focused on social emotional supports

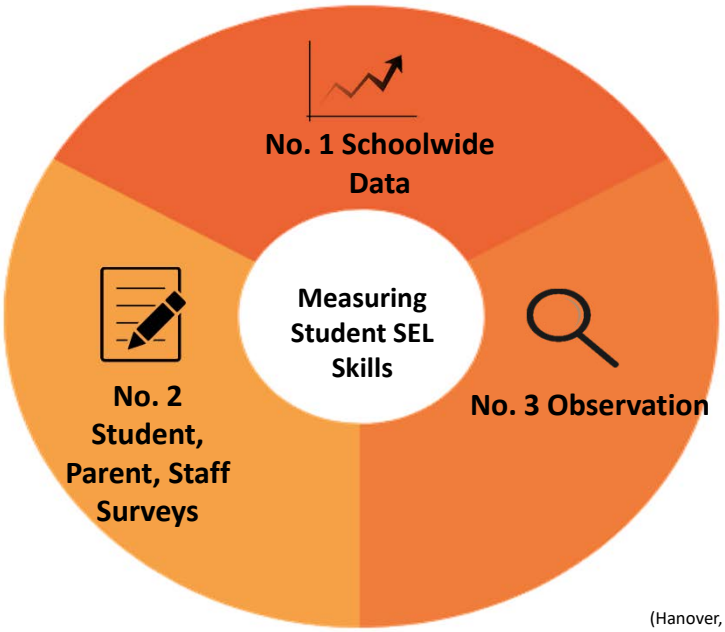
SEL Integration

- Added SEL-related support staff (MTSS and LCAP)
- Twenty-six school sites now participating in PBIS training; added RP trainers/coaches
- Bullying prevention and Alcohol and Other Drug (AOD) services incorporating SEL
- Integration in after-school programs (Bridges)
- Realignment of district mental health supports (Support Centers, Special Education, White House Counseling)

7

San Juan Unified School District

How SEL is Measured



(Hanover, 2017)

8

San Juan Unified School District

SEL Check Engine Light Indicators:

- Significantly disproportionate chronic absenteeism rates for African American and Hispanic/Latino students (gaps range between 11-26 percent)
- Hispanic/Latino and African American home suspension rates disproportionate (gaps range between 8-9 percent)
- African American graduation rates disproportionate (8 percent)
- Significant difference in student SEL survey responses as compared to staff and parents in the areas of school climate, school community and mutual respect
- Approximately one-third of students and staff feel bullying is an issue on their school campus

9

Questions we are asking …

Based on our "Check Engine Light" data:

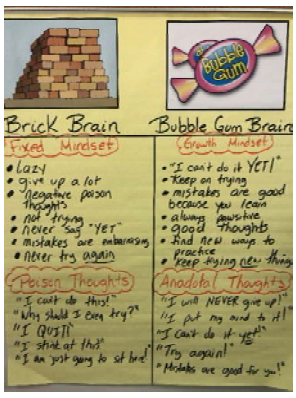
- To ensure all students have access to instruction in the SEL competencies, what additional indicators might we explore to help us better understand what is needed?
- What are the ways we are measuring the success of our current SEL supports related to our underrepresented students?
- How might we integrate and focus our SEL resources on student groups demonstrating consistently disproportionate SEL indicators?
- How might we align our existing frameworks, programs and curriculum to allow for school sites to integrate SEL competencies more readily?

10

Voices from the Field:

- **Loretta Moreland** — *3rd Grade Teacher, Lichen K-8 School*
- **Steve Weaver** — *School Social Worker, MTSS Support Centers*

SEL in the Classroom



"Brick Brain"
vs.
"Bubble Gum Brain"



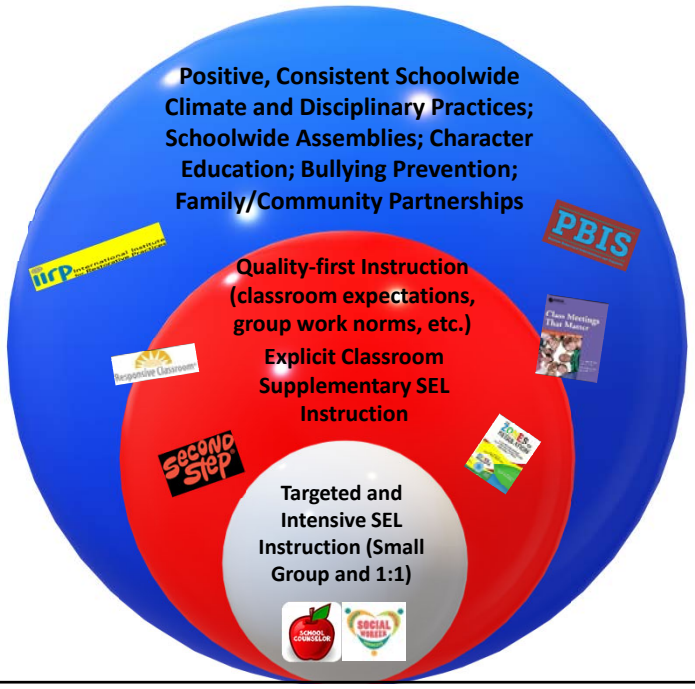
"I Messages"



"Four-Part Apologies"

Site Level SEL Integration





13

San Juan Unified School District

SEL: Next Steps

- Further align future SEL professional development efforts and integration through a Networked Improvement Community (NIC) focused on the specific goals and actions set forth in the updated strategic plan and LCAP
- Development of a district SEL online toolkit for sites and staff to access resources and expand SEL implementation
- Continue to focus on the natural intersection between SEL competencies and district frameworks and instruction to improve equity, culture/climate and student outcomes

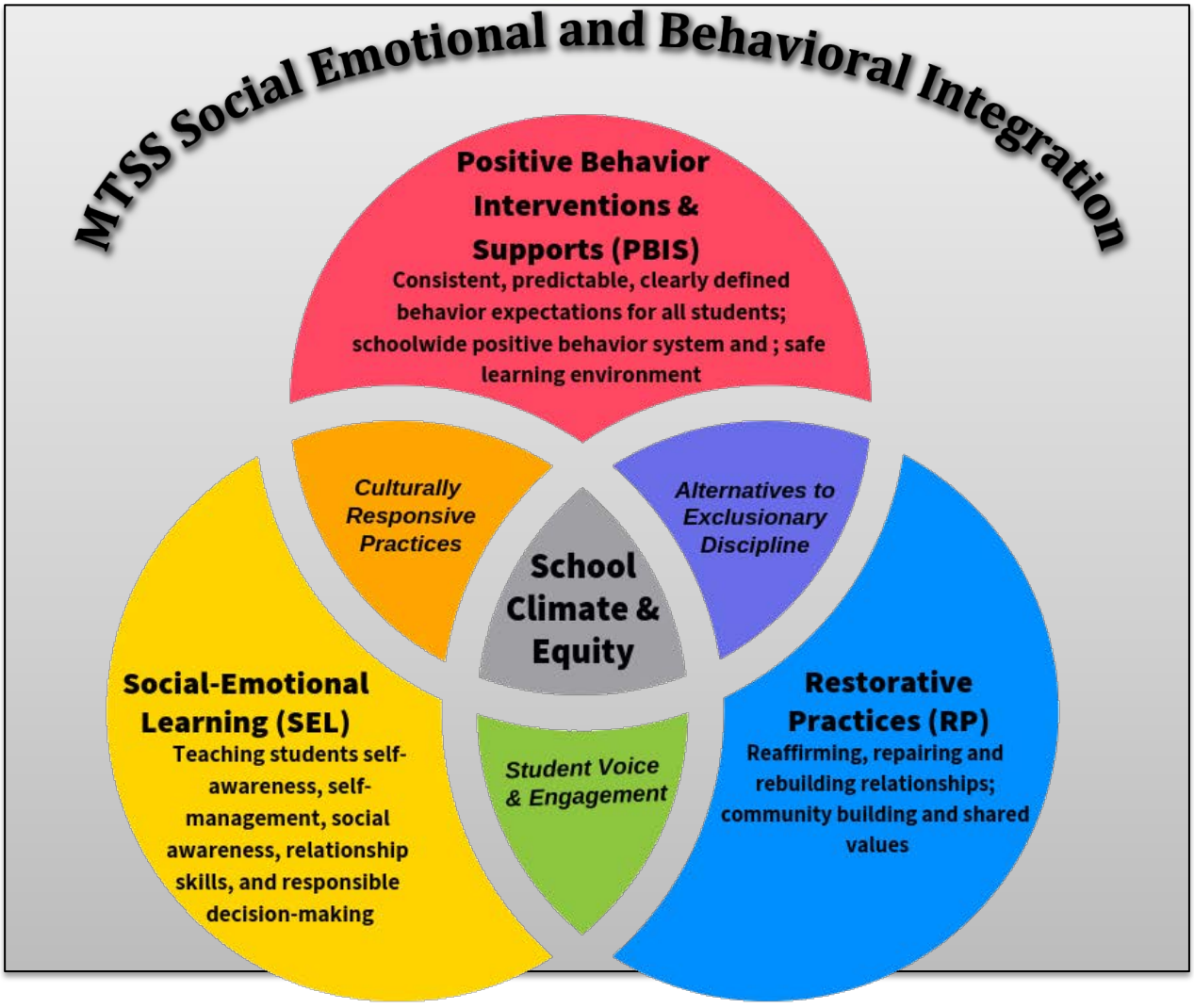
14

San Juan Unified School District

Integrating Social Emotional Learning (SEL), Positive Behavior Interventions and Supports (PBIS), Restorative Practices (RP) and Learning Supports within a Multi-Tiered System of Supports (MTSS)

Schools can, and should, integrate SEL with RP and PBIS. SEL, RP and PBIS are complementary strategies that help students build and preserve positive relationships with adults and peers. RP build upon the skills and supports provided through PBIS and SEL to ensure that students learn how to maintain strong relationships, despite difficulties and conflicts they may experience. (Hanover, 2017)





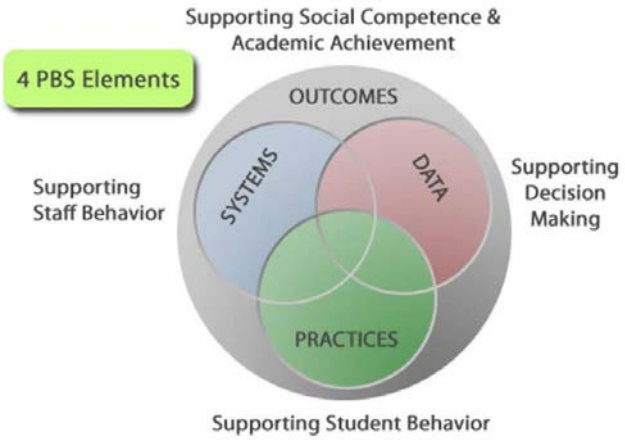
What is Positive Behavior Interventions and Supports (PBIS)?

PBIS is a proactive approach to establishing the behavioral supports and social culture needed for all students in a school to achieve social, emotional and academic success. Attention is focused on creating and sustaining school-wide, classroom and individual systems of support that improve results for all youth by making targeted misbehavior less effective, efficient and relevant and desired behavior more functional.

Research has shown that the implementation of punishment, especially when used inconsistently and in the absence of other positive strategies, is ineffective. Schools applying PBIS begin by establishing clear expectations for behavior that are taught, modeled and reinforced across all settings and by all staff.

PBIS is not: a packaged curriculum, abandonment of discipline, bribery for good behavior, ignoring inappropriate behavior, a quick fix or just for one type of school.

Over the last 3 years, 31 schools in SJUSD have participated in PBIS training cohorts. An additional 11 SJUSD schools participated in prior training and continue to practice school-wide Positive Behavioral Supports (PBS).



Examples from Winston Churchill Middle School

SCHOOLWIDE EXPECTATIONS

Location	Respectful/Kind	Responsible	Safe
EVERYWHERE	• Always respect school-wide expectations. • Use appropriate school language. • Respect individual differences.	• Be responsible for your actions. • Follow directions the first time given by staff. • Accept consequences without arguing or defending. • Cell phones can be used appropriately before school, after school, and at lunch.	• Keep hands, feet and objects to yourself. • Stay in supervised areas. • Respect personal space. • Churchill is a "wheel free" school.
LOCKER ROOM	• Touch only your belongings. • Respect others' privacy. • Locker rooms are for clothing changes only.	• Follow the PE dress code. • Always dress out as quickly as possible. • Always lock up your personal belongings. • Always use your school issued lock. • Keep your lock and lock combination private. • Keep electronic devices put away.	• Please enter safely and walk inside locker room. • Use proper hygiene.
COMPUTER/ TECHNOLOGY	• Gossip-free zone • Always use for positive and polite, academic interactions.	• Use only your assigned electronic device. • Alterations and downloads are with staff approval only. • Always ask before you print. • Return device in its original condition. • Report any issues.	• Only use school approved internet sites • Handle all school issued electronic devices with care.
RESTROOMS	• Be respectful of other students' privacy • Gossip-free zone	• Keep the bathrooms clean and free of vandalism • Take care of your business and leave	• Use proper hygiene • No foreign objects in the toilets • Report issues to adults
LIBRARY	• Use your quiet voice • Treat books and equipment with respect. • Leave gum/candy/drinks in cafeteria	• Clean up after yourself. • Have your ID card ready • Turn in books on time.	• Use computers for school approved activities only • Push in your chair when you leave
BLACKTOP & FIELDS	• Keep hands and feet to yourself • Be respectful of other students' personal space	• Treat equipment with care and return it promptly. • Use your ID card to check out equipment. • Food-free zone • Keep it clean	• Stay in designated areas • Use benches, planter boxes, and tables appropriately • Walk in the quad, run in the fields. • Use equipment as it is intended.
HALLWAYS	• Respect personal space • Use appropriate language	• Must have signed hallway passport while classes are in session. • Stay outside when the hallways are closed. • Go straight to your destination.	• Always watch where you're walking. • Report unsafe behavior. • Be aware of your surroundings.

STUDENT RESPONSIBILITIES AND SCHOOLWIDE EXPECTATIONS

You are a representative of Winston Churchill Middle School at all times while on the campus, at any extracurricular activities on/off the campus, and on the way to and from school. All San Juan Unified School District students are expected to:

- **Follow directions the first time given.**
- **Follow the school dress code.**
- **Keep hands, feet, inappropriate words and objects to yourself.**
- **Clean your area, deposit trash and recycle.**
- **Keep school a gossip free zone.**

In sum: As a diverse community, Churchill Middle School's students and staff focus on personal responsibilities in our goal of creating an accepting (positive), safe, academic environment for all.

All members of Churchill Middle School believe that:

BULLDOGS ARE ALWAYS RESPONSIBLE RESPECTFUL KIND AND SAFE

What is Social Emotional Learning (SEL)?

SEL involves the processes of developing social and emotional competencies in children. SEL programming is based on the understanding that the best learning emerges in the context of supportive relationships that make learning challenging, engaging and meaningful; social and emotional skills are critical to being a good student and individual. Many different risky behaviors (e.g. drug use, violence, bullying and school dropout) can be prevented or reduced when multi-year, integrated efforts develop students' social and emotional skills.

SEL is best done through effective classroom instruction, student engagement in positive activities in and out of the classroom and broad parent and community involvement in program planning, implementation and evaluation.

Effective SEL programming begins in preschool and continues through high school. The Collaborative for Academic, Social and Emotional Learning (CASEL) has identified five interrelated sets of cognitive, affective, and behavioral competencies: Self-Awareness, Self-Management, Social Awareness, Relationship Skills and Responsible Decision-Making.

While there are many curriculums based on the CASEL competencies, common SEL programs in SJUSD include: Second Step, Class Meetings that Matter, Safe School Ambassadors and Strong Kids/Teens. Additional SEL programs supported by the district can be located in the SJUSD menu of Academic, Behavioral and Social Emotional Supports.





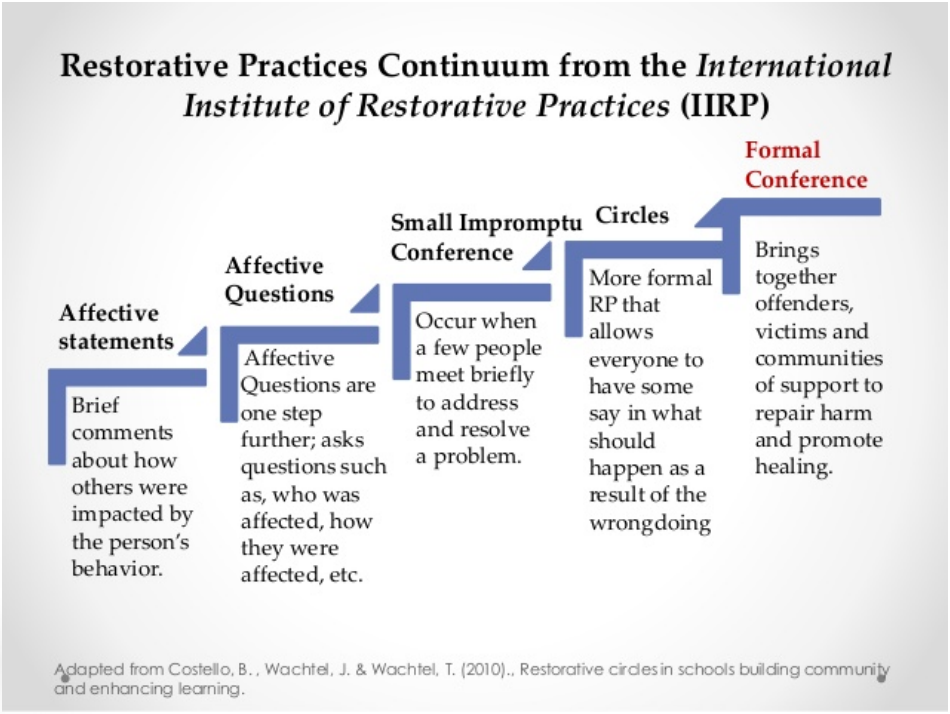


What are Restorative Practices (RP)?

A restorative school is one that takes a restorative approach to resolving conflict and preventing harm. Restorative approaches enable those who have been harmed to convey the impact of the harm to those responsible, and for those responsible to acknowledge this impact and take steps to make it right.

Restorative approaches refer to a range of methods and strategies which can be used to both prevent relationship-damaging incidents from happening and to resolve them if they do happen. Becoming a restorative school has many benefits, including increased attendance, reduced suspensions and improved achievement. It can also alleviate problems such as bullying, classroom disruption, truancy, antisocial behavior and disputes between students, their families and staff members.

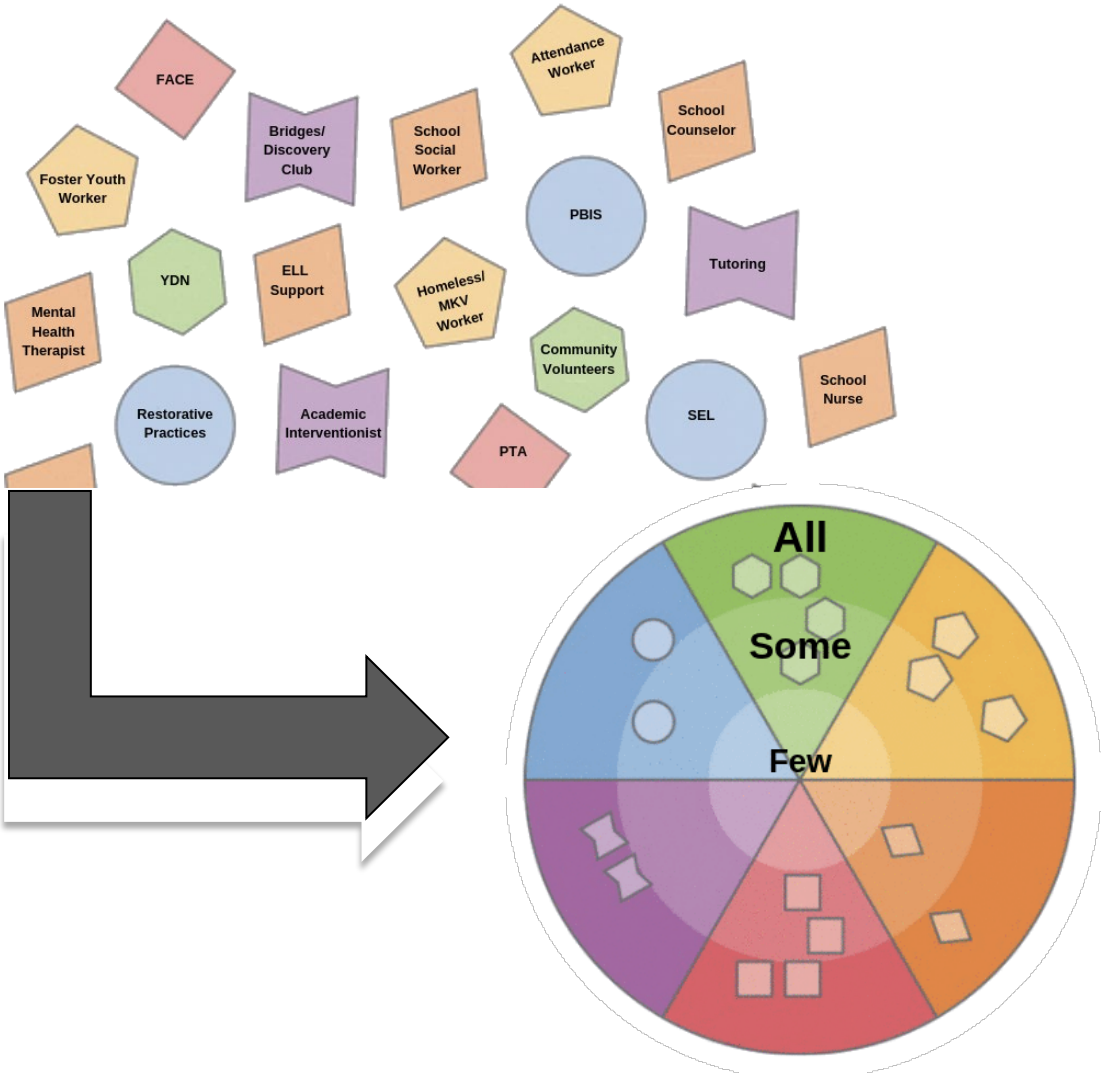




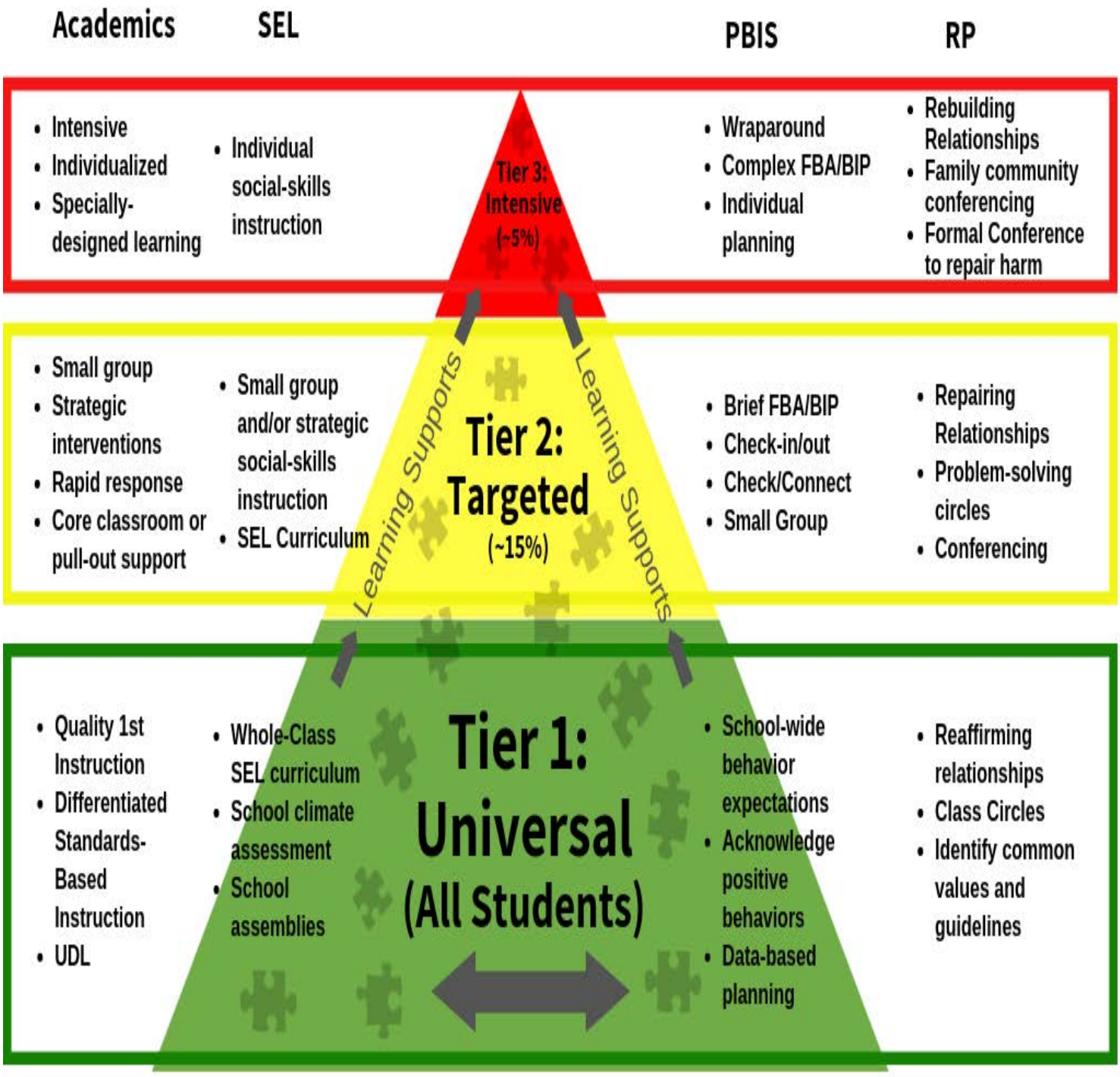
Learning Supports Team (LST) within a Multi-Tiered System of Supports (MTSS)?

Learning supports are the resources, strategies and practices within a MTSS that address intellectual, physical and social emotional development to ensure student success. Learning supports are deployed in classrooms and schools to address barriers to learning and to re-engage disconnected students.

Most schools have teams that focus on individual student issues (e.g. Student Study Team or Student Intervention Team). These teams tend to focus on such activities as case management, triage and referral. In contrast to this case-by-case focus, a LST can take responsibility for enhancing the use of all resources available to the school by addressing barriers to student learning. Without a system to identify a site's needs and organize its learning supports, resources tend to operate in isolation. The LST essentially functions as a site-level MTSS team. The work of the LST includes analyzing site data, mapping existing resources and clarifying how resources should be used to build a comprehensive and cohesive approach to eliminating barriers to student learning.



Integration of SEL, PBIS, RP and Learning Supports within a Multi-Tiered System of Supports (MTSS)



FBA: Functional Behavioral Analysis
BIP: Behavior Intervention Plan
UDL: Universal Design for Learning

California's Social and Emotional Learning *Guiding Principles*



1 Adopt Whole Child Development as the Goal of Education

Take a systems approach to promoting student academic, social, and emotional learning, physical well-being, and college, career, and civic life readiness. Name SEL as not a "nice to have," but a "must have" to ensure student success in school, work, and community.



2 Commit to Equity

All students must have opportunities to build SEL skills and receive an assets-based educational experience that is personalized, culturally relevant and responsive, and intentionally addresses racism and implicit bias. Use practices that build on the existing strengths of students, educators, families, and communities.



3 Build Capacity

Build the capacity of both students and adults through an intentional focus on relationship-centered learning environments and by offering research-based learning experiences that cultivate core social and emotional competencies.



4 Partner with Families and Community

Maximize the resources of the entire school community, including expanded learning opportunities, early learning and care programs, and family and community partnerships, to advance SEL and student well-being.



5 Learn and Improve

Adopt continuous improvement practices and use evidence to guide decision-making while aiming to enhance the quality of student social and emotional learning opportunities. Use data to inform improvement of instructional and school practices, not for accountability purposes.

https://www.cde.ca.gov/eo/in/socialemotionallearning.asp

School-wide Implementation Rubric of Social Emotional Learning (SEL)

(Part of Goal Two in the SJUSD LCAP and part of SPSAs)

The CASEL (Collaborative for Academic, Social and Emotional Learning) competencies are the SEL standards while the
curriculum/approach to teaching SEL are the resources professionals use to meet the standards.

Note: "SEL Approach" as used below refers to the program or system a site may use to teach students the SEL competencies

Guidelines for Rubric Use

- The purpose of the implementation rubric is three-fold:
  1. Develop common language within San Juan about implementation steps
  2. Serve as a self-assessment for leadership teams in identifying areas of strength and areas for growth for each SEL approach they are implementing
  3. Serve as a feedback loop to inform LCAP goals and to provide additional support/resources

- Leadership teams would use the rubric to discuss each aspect of implementation and decide as a team where the site is in implementation of **one** SEL approach
  - For school sites engaging in more than one SEL approach, the leadership team would use the process to determine next steps for each approach

- The labels at the top of each column are only for purposes of conversation; the goal for the team is to identify next steps for each aspect of implementation, not evaluate the site on its performance

	Exploring	Operationalizing	Implementing	Integrating	Sustaining
Collaborative Team & Staff Buy-in *Note: Collaborative team may be formal or informal at initial phases*	Early adopters/ first cohort explore(s) SEL approaches Early adopters/first cohort meet(s) to discuss what they are learning Early adopters/first cohort find(s) opportunities to introduce staff to SEL approach to share their learning	Collaborative team forms (includes administrator and teacher/other staff leaders) Team meetings are occasionally scheduled to share learning with each other Second cohort forms or early adopter team expands Collaborative team finds ways to share the learning with staff Staff members express interest in learning more about SEL approach and team shares information	Collaborative team re-establishes annually Team meetings are regularly occurring Staff identifies SEL approach as PD (Professional Development) priority for the year Develop common agreements	Collaborative team works with leadership team to plan/outline opportunities for integrating SEL topics or activities into academic content (grade levels and departments) Staff determines SEL is part of ongoing school focus Curriculum connections are identified for integration with SEL approach Collaborative team engages leadership and/or administrative team to review school policies and practices using an equity lens to ensure alignment with SEL approach Collaborative Team is aware of other sites engaging in similar SEL approach	Collaborative team meets regularly for progress monitoring and outcomes; gathers feedback from staff regularly Collaborative team regularly collaborates with the leadership team Staff members determine SEL should be integrated into the school PD focus Curriculum connections are integrated with SEL approach Grade levels/ departments meet to identify tools/supports for integration plan Collaborative team collaborates with other sites engaging in similar SEL approach

	Exploring	Operationalizing	Implementing	Integrating	Sustaining
Communication	Early adopters/first cohort share(s) information with interested colleagues	Collaborative team shares information with the site leadership team Collaborative team develops ways to share information with staff Identify and define key vocabulary	Collaborative team works with leadership team to develop a plan to launch SEL approach to students and families Collaborative team establishes feedback loop between staff Develop common language	Develop communication plan to students and families of SEL approach and anticipated adjustments for the year (e.g. handbook, Back-to-School-Night, etc.) Informal networking/communication with sites engaging in similar SEL approach	Explore potential community partnerships to deepen implementation of SEL approach Establish on-going communication with other sites engaging in similar SEL approach

	Exploring	Operationalizing	Implementing	Integrating	Sustaining
Training/ Professional Development	Early adopters/first cohort attend(s) training Early adopters/first cohort observe(s) program at another school or classroom using SEL approach	Second cohort or expanded early adopters attend(s) training Second cohort or expanded early adopters determine collective learning process (including, but not limited to: observation in each other's classrooms, PLC (Professional Learning Community, etc.)	Whole staff receives initial training District/site supports provided (ex. coaching, consultation, etc.) Collaborative team, in partnership with leadership team, develops plan for engaging for practitioners throughout the year	Training is differentiated for staff (considering varying levels of experience with SEL approach) and is integrated into the site PD plan Staff determines ongoing collective learning process and supports (including, but not limited to: observation in volunteer classrooms, PLC, etc.) District/site supports provided (ex. coaching, consultation, etc.) and site develops plans for sustainability	Training continues to be differentiated for staff and is integrated into the site PD plan Staff determines collective learning process and includes staff supports (including, but not limited to: observation in volunteer classrooms, PLC, etc.) and embeds reflection activity as part of a co-planning cycle Site/district secure on-going supports, program materials, and resources

	Exploring	Operationalizing	Implementing	Integrating	Sustaining
Progress monitoring, refinement, and integration	Early adopters/first cohort identify ways to measure preliminary indicators of success of SEL approach- (may include anecdotal data) **	Collaborative team reflects on prior year's indicators to inform practices * Collaborative team selects target areas to address and identify preliminary indicators of success **	Collaborative team reflects on prior year's anecdotal data, site data, and student trends to refine practices and shares learning with staff * Staff selects target areas and identifies indicators of success * Collaborative team develops feedback cycles to inform needed adjustments for current implementation process and to determine next steps for growth (survey, focus groups, etc.) **	Staff reviews student outcomes to determine needed adjustments and next steps through a collaborative process * Collaborative team creates processes of formatively assessing implementation (ex. checking in with teachers/staff and their comfort of using materials) ***	Staff co-creates (with students and families) processes of formatively assessing implementation (ex. checking in with teachers/staff and their comfort of using materials) * Staff engaged in data/evaluation conversations to refine approach *** Staff reflects on prior year's data/impact to revise approach and consider steps to fill in gaps (including reviewing SEL competencies) *

Recommended Frequency:
** Annually*
*** Twice per year*
**** Once per quarter/trimester*

	Exploring	Operationalizing	Implementing	Integrating	Sustaining
Resources and Budget	Early adopters/first cohort use available resources	Collaborative team secures resources for second cohort/expanded early adopters Collaborative team develops a plan for expanded funding and securing resources (site, district, community)	Collaborative team works with leadership team to secure district/site/ community resources for training and materials and/or curriculum for the staff	Collaborative team works with leadership team to secure sustainable district/site resources for training, materials and curriculum	Resources are in the school budget for on-going updating/replacing materials, resources and training
SEL Competency Alignment *Use SEL Competency sheet to inform discussion* *Note: One SEL approach is <u>not</u> likely to cover all the competencies*	Early adopters/first cohort review SEL competencies and SEL approach to note areas of alignment	Collaborative team reviews SEL competencies to further explore areas of alignment between SEL approach and SEL competencies Team identifies possible gaps between SEL approach and SEL competencies	Staff explores areas of alignment between SEL approach and SEL competencies Explore grade level and departmental alignment of in SEL approach Staff identifies areas of alignment and gaps between SEL approach and SEL competencies	Grade levels and department crosswalk SEL approach with academic standards and explore vertical alignment Review all current SEL approaches to identify site alignment and gaps with SEL competencies Develop an integration plan for other SEL approach(es) to address identified gaps	Integrate all SEL approaches SEL is integrated across content standards

SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION

AGENDA ITEM: ___I-2____

MEETING DATE: 01/28/2020

SUBJECT: Annual Policy Review

CHECK ONE:
For Discussion: ☒
For Action: ☐
Report: ☐
Workshop: ☐
Recognition: ☐
Emergency Action: ☐

DEPARTMENT: Legal Services

ACTION REQUESTED:
The superintendent is recommending that the board discuss and review the following policies. One policy revision is recommended at this time.

BP 3430	Investing and Debt Management (Attachment A). The county's investment policy, on which the district's board policy is based, is included as Attachment B for the board's review.
BP 5116.1	Intradistrict Open Enrollment (Attachment C)
BP 6020	Parent Involvement and Family Engagement (Attachment D)
BP 6145	Extracurricular/Cocurricular Activities (Attachment E – proposed revisions)

Action anticipated: February 11, 2020

RATIONALE/BACKGROUND:
Board Bylaw 9311, in accordance with state and local law, requires an annual review of certain board policies.

- Government Code section 53646 recommends an annual review of the district's investing policy (BP 3430, last updated by the board on January 24, 2017). To do so necessitates a review of Sacramento County's investment policy (on which the district's board policy is based).
- Title 20 United States Code section 6318 requires an annual review of the district's parental involvement policy (BP 6020, last updated by the board on April 9, 2019).
- Education Code section 35160.5 requires that the Board of Education annual review policies pertaining to student participation in extracurricular/cocurricular activities (BP 6145, last updated by the board on January 27, 2015) and open enrollment (BP 5116.1, last updated by the board on February 12, 2019).

Staff has reviewed these board policies and is recommending revisions to BP 6145.

ATTACHMENTS:

Attachment A/B:	BP 3430 – Investing and Debt Management
Attachment C:	BP 5116.1 – Intradistrict Open Enrollment
Attachment D	BP 6020 – Parent Involvement and Family Engagement
Attachment E	BP 6145 – Extracurricular/Cocurricular Activities

BOARD COMMITTEE ACTION/COMMENT:
N/A

PREVIOUS STAFF/BOARD ACTION:
Superintendent's Cabinet: 12/16/2019, 01/21/2020

FISCAL IMPACT:
Current Budget: $ N/A
Additional Budget: $ N/A
Funding Source: N/A
(unrestricted base, supplemental, other restricted, etc.)
Current Year Only ☐ Ongoing ☐

LCAP/STRATEGIC PLAN:
Goal: N/A Focus: N/A
Action: N/A
Strategic Plan: N/A

PREPARED BY: Linda C. T. Simlick, J.D., General Counsel LCTS

APPROVED BY: Kent Kern, Superintendent of Schools KK

San Juan USD

Board Policy

Investing And Debt Management

BP 3430
Business and Noninstructional Operations

Investing

The superintendent or designee may invest as permitted by law all or part of the special reserve fund of the district or any surplus monies not required for the immediate necessities of the district. Such investments must be made with care, skill, prudence and diligence. (Education Code section 41015; Government Code sections 16430, 53601-53609, 53635)

The Governing Board recognizes that the district's chief fiscal officer has fiduciary responsibility for any funds invested outside the county treasury and is subject to prudent investor standards for investment decisions. As such, he/she shall act with care, skill, prudence and diligence under the prevailing circumstances, including but not limited to the general economic conditions and the anticipated needs of the district. The investment objectives shall be to first safeguard the principal of the funds, then to meet the district's liquidity needs and, third, to achieve a return on the funds. (Government Code sections 53600.3, 53600.5) County treasury investment reports shall be shared with the board quarterly. Reports of funds invested outside the county treasury shall be provided to the board monthly.

The board recognizes the importance of overseeing investments made with district funds, including investments by the county treasurer. The superintendent or designee shall maintain ongoing communication with any county committee established for the purpose of overseeing county investments. In addition, the superintendent or designee shall keep the board informed about county policies that guide the investment of these funds.

The superintendent or designee may annually provide to the board and any oversight committee a statement of the district's investment policy which the board shall consider at a public meeting. Any changes in the policy shall also be considered by the board at a public meeting. In accordance with law and administrative regulations, the superintendent or designee may also provide the board quarterly reports with specified components, including a statement of how the district portfolio compares with the district's investment policy. (Government Code section 53646)

Debt Management

This debt policy sets forth a set of comprehensive guidelines for short-term and long-term debt. It is the objective of this policy to incorporate the new Local Debt Policy requirements of Government Code section 8855(i) into the district's previously existing policy.

The district's capital planning goals and objectives (Government Code section 8855(i)(1)(D) are as follows:

1. The district shall obtain financing only when necessary or desirable as determined by the Board of Education.

2. The district will identify the appropriate timing and amount of debt or other financing needs as required.

3. The district will pursue efficient debt issuance strategies, and obtain favorable interest rates and other costs in issuing the debt.

The superintendent or designee, chief financial officer and director of accounting will have the primary responsibility for developing financing recommendations and ensuring the implementation of this debt policy. The responsibilities include:

1. Reviewing the district's capital improvement program and consider the need for financing to maintain the progress on the capital improvement program.

2. Developing a Request for Proposal (RFP) that will be used in the selection of bond counsel, financial advisor and/or underwriter if necessary.

3. Selecting the financing participants for each debt issue, ensuring the debt issue is integrated with the district's overall financing program, approving the structure of each debt issue, and reviewing and approving all documentation for each issue.

4. Overseeing the preparation of the information for the official statement for debt issues.

5. Meeting as necessary in preparation for a financing or to review changes in state or federal laws or regulations.

6. Preparing all information for the bond rating agencies and making presentations as necessary.

7. Administering post debt issuance responsibilities, including the investment and expenditure of the debt proceeds, compliance with annual reporting requirements, and taking steps to help ensure that debt payments are made on time.

8. Ensuring that the arbitrage requirements are monitored and that the appropriate reports are filed with the federal government.

9. Implementing and managing internal control procedures to ensure that the proceeds of proposed debt will be directed to the intended use (Government Code section 8855(i)(1)(E).

Bond Counsel

The district will seek the legal advice of the bond counsel on questions involving state and federal law on proposed and outstanding debt issuances. Bond counsel will prepare the resolutions, legal documents, and opinions necessary for delivery of a valid debt issuance. The bond counsel will determine the district's compliance with all applicable laws and procedures for issuing debt. At the district's discretion, bond counsel may also serve as disclosure counsel, and prepare the documents traditionally performed in this capacity including delivery of the Official Statement, Bond Purchase Agreement, and Notice of Sale, and Continuing Disclosure Agreement. The bond counsel will perform other services as defined by the contract approved by the district.

Financial Advisor/Underwriter

District staff will seek the advice of a financial advisor and/or underwriter when necessary. The financial advisor will advise on the structuring of the debt obligations that will be issued, inform the district of the options available for each issue, advise the district as to how choices will impact the marketability of the district's obligations, and provide other services as defined by the contract approved by the district.

Use of Short- and Long-Term Debt

The district's debt policy for the use of Short Term Operating Debt and Long Term Capital Debt (Government Code section 8855(i)(1)(A)) are provided below.

1. Short-Term Debt

Internal interim financing - In order to defer the issuance of debt obligations, when sufficient non-restricted funds are on hand, consideration will be given to appropriating them to provide interim financing for large construction projects. When the debt obligation is subsequently issued, the non-restricted funds will be repaid.

(cf. 3460 - Periodic Financial Reports and Accountability)

External interim financing - Expenditures associated with the day-to-day operations of the district will be covered by current revenues. However, because the district does not receive its revenues in equal installments each month and the largest expenditures occur in equal amounts, the district may experience temporary cash shortfalls. To finance these temporary cash shortfalls, the district may incur short-term operating debt, typically, tax and revenue anticipation notes (TRANS). The district will base the amount of the short-term operating debt on cash flow projections for the fiscal year and will comply with applicable federal and state regulations. The district will pledge operating revenues to repay the debt, which will be repaid in one year or less. The district will minimize the cost of the short-term borrowings to the extent possible and may participate in pooled TRANS to meet this goal.

2. Long-term Capital Debt

Prior to issuing debt, the district will examine the relationship of the debt to be issued

with the consideration to its capital improvement plan (Government Code section 8855(i)(1)(C). It will consider the following factors as part of its evaluation:

a. The district will not use long-term obligations for operating purposes.

b. The weighted average maturity will not exceed 120 percent of the remaining expected useful life of the project financed.

c. The district will structure debt in a manner that maximizes debt proceeds, minimizes interest costs, and allows for future debt issuances. The debt structure will also reflect the financing needs and projected ability to make debt payments through the repayment of the debt issued.

d. The district will not issue unfunded long-term debt in excess of 3 percent of annual general fund revenues, unless there is a dedicated tax levy, surplus property sale, fixed lease payments from another public agency or redevelopment revenue stream committed to service the debt.

Types of Debt

Described below are the types of debt that may be issued under this debt policy (Government Code section 8855(i)(1)(B)).

1. General obligation bonds, lease revenue bonds, certificates of participation, lease purchase transactions, land secured financings, and bond, lease or grant anticipation notes that may be issued to finance significant capital improvements. The district will primarily rely on the issuance of general obligation bonds to fund its capital projects. All projects financed by general obligation bonds will be determined by the district's project list approved by the voters, the constraints of applicable law, and district's priorities.

Whenever the option exists to offer an issue either for competition or negotiation, the superintendent or designee, the chief financial officer, and director of accounting will undertake an analysis of the options to aid in the decision making process.

2. Refundings

The district will consider refunding debt whenever an analysis indicates the potential for present value savings of approximately four percent of the principal being refunded or at least $200,000. The financial advisor will compute the economic gain or loss on the refunding and the superintendent or designee, the chief financial officer, and director of accounting will verify the computation.

3. Capital Leases

Capital leasing is an option for the acquisition of equipment or other assets with a cost of less than $500,000.

The district will not consider leasing when there are available funds on hand for the acquisition unless the interest expense associated with the lease is less than the interest that can be earned by investing the funds on hand or when other factors such as budget constraints override the economic consideration.

When a lease is arranged with a private sector entity, the district will seek a tax-exempt rate. When a lease is arranged with a government or other tax-exempt entity, the district will try to obtain an explicitly defined taxable rate so that the lease will not be counted in the district's total annual borrowings subject to arbitrage rebate.

The lease agreement will permit the district to refinance the lease at no more than reasonable cost. A lease that can be called at will is preferable to one that can merely be accelerated.

Method of Sale

When feasible and economical, the district may issue bonds either by competitive or negotiated sale. Whenever the option exists to offer an issue either for competition or negotiation, the superintendent or designee, the chief financial officer, and director of accounting will undertake an analysis of the options to aid in the decision making process.

District staff may use a private placement by obtaining at least three competitive proposals. In evaluating the proposals, the net present value of the competitive bids will be compared, taking into account how and when the payments are made. If required by statute, the purchase price of equipment will be competitively bid.

Bond Rating

District staff will monitor its credit ratings, and provide all information relevant for the purposes of obtaining, maintaining, and improving its credit ratings.

Arbitrage Liability Management

The district will make every effort to minimize the cost of the arbitrage rebate and yield restriction while strictly complying with the law. The federal arbitrage law is intended to discourage entities from issuing tax exempt obligations unnecessarily. In complying with the spirit of the law, the district will not issue obligations except for identifiable projects with very good prospects of timely initiation. Obligations will be issued as closely in time as feasible to the time contracts are awarded so as to minimize the time the debt proceeds are unspent.

The district's bond counsel and financial advisor will review, in advance, all arbitrage rebate payments and forms sent to the IRS.

Legal Reference:
EDUCATION CODE
41001 Deposit of money in county treasury
41002 General fund deposits and exceptions
41002.5 Deposit of certain funds in insured institutions
41003 Funds received from rental of real property
41015 Authorization of and limitation investment of district funds
41017 Deposit of miscellaneous receipts
41018 Disposition of money received
42840-42843 Special reserve fund
GOVERNMENT CODE
8855 California Debt and Investment Advisory Commission: accountability reports
16430 Eligible securities for investment of surplus money
17581.5 Mandates contingent upon state funding
27000.3 Fiduciary for deposits in county treasury
27130-27137 County treasury oversight committees
53600-53609 Investment of surplus
53630-53686 Deposit of funds, especially:
53635 Local agency funds; deposit or investment
53646 Treasurer reports and statements of investment policy
53852.5 Investment term for funds designated for repayment of notes
53859.02 Borrowing by local agency

Management Resources:
CSBA PUBLICATIONS
Maximizing School Board Governance: Fiscal Accountability, 2005
School Finance CD-ROM, 2005
CALIFORNIA DEBT AND INVESTMENT ADVISORY COMMISSION PUBLICATIONS
Local Agency Investment Guidelines, 2002, rev. 2004
WEB SITES
California State Treasurer's Office, California Debt and Investment Advisory Commission:
http://www.treasurer.ca.gov/cdiac

Policy SAN JUAN UNIFIED SCHOOL DISTRICT
adopted: June 9, 1992 Carmichael, California
revised: May 27, 1997
revised: February 28, 2006
revised: February 27, 2007
revised: January 27, 2009
revised: March 22, 2011
revised: January 28, 2014
revised: January 24, 2017

SACRAMENTO COUNTY

Annual Investment Policy of the Pooled Investment Fund

CALENDAR YEAR 2020

Approved by the
Sacramento County Board of Supervisors

December 17, 2019
Resolution No. 2019-0856

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SACRAMENTO COUNTY

Annual Investment Policy of the Pooled Investment Fund

CALENDAR YEAR 2020

I. Authority

Under the Sacramento County Charter, the Board of Supervisors established the position of Director of Finance and by ordinance will annually review and renew the Director of Finance's authority to invest and reinvest all the funds in the County Treasury.

II. Policy Statement

This Investment Policy (Policy) establishes cash management and investment guidelines for the Director of Finance, who is responsible for the stewardship of the Sacramento County Pooled Investment Fund. Each transaction and the entire portfolio must comply with California Government Code and this Policy. All portfolio activities will be judged by the standards of the Policy and its investment objectives. Activities that violate its spirit and intent will be considered contrary to the Policy.

III. Standard of Care

The Director of Finance is the Trustee of the Pooled Investment Fund and therefore, a fiduciary subject to the prudent investor standard. The Director of Finance, employees involved in the investment process, and members of the Sacramento County Treasury Oversight Committee (Oversight Committee) shall refrain from all personal business activities that could conflict with the management of the investment program. All individuals involved will be required to report all gifts and income in accordance with California state law. When investing, reinvesting, purchasing, acquiring, exchanging, selling and managing public funds, the Director of Finance shall act with care, skill, prudence, and diligence to meet the aims of the investment objectives listed in Section IV, Investment Objectives.

IV. Investment Objectives

The Pooled Investment Fund shall be prudently invested in order to earn a reasonable return, while awaiting application for governmental purposes. The specific objectives for the Pooled Investment Fund are ranked in order of importance.

A. Safety of Principal

The preservation of principal is the primary objective. Each transaction shall seek to ensure that capital losses are avoided, whether they be from securities default or erosion of market value.

B. Liquidity

As a second objective, the Pooled Investment Fund should remain sufficiently flexible to enable the Director of Finance to meet all operating requirements that may be reasonably anticipated in any depositor's fund.

C. Public Trust

In managing the Pooled Investment Fund, the Director of Finance and the authorized investment traders should avoid any transactions that might impair public confidence in Sacramento County and the participating local agencies. Investments should be made with precision and care, considering the probable safety of the capital as well as the probable income to be derived.

D. Maximum Rate of Return

As the fourth objective, the Pooled Investment Fund should be designed to attain a market average rate of return through budgetary and economic cycles, consistent with the risk limitations, prudent investment principles and cash flow characteristics identified herein. For comparative purposes, the State of California Local Agency Investment Fund (LAIF) will be used as a performance benchmark. The Pooled Investment Fund quarterly performance benchmark target has been set at or above LAIF's yield. This benchmark was chosen because LAIF's portfolio structure is similar to the Pooled Investment Fund.

V. Pooled Investment Fund Investors

The Pooled Investment Fund investors are comprised of Sacramento County, school and community college districts, districts directed by the Board of Supervisors, and independent special districts whose treasurer is the Director of Finance. Any local agencies not included in this category are subject to California Government Code section 53684 and are referred to as outside investors.

VI. Implementation

In order to provide direction to those responsible for management of the Pooled Investment Fund, the Director of Finance has established this Policy and will provide it to the Oversight Committee and render it to legislative bodies of local agencies that participate in the Pooled Investment Fund. In accordance with California Government Code section 53646, et seq., the Board of Supervisors shall review and approve this Policy annually.

This Policy provides a detailed description of investment parameters used to implement the investment process and includes the following: investable funds; authorized instruments; prohibited investments; credit requirements; maximum maturities and concentrations; repurchase agreements; Community Reinvestment Act Program; criteria and qualifications of broker/dealers and direct issuers; investment guidelines, management style and strategy; Approved Lists; and calculation of yield and costs.

VII. Internal Controls

The Director of Finance shall establish internal controls to provide reasonable assurance that the investment objectives are met and to ensure that the assets are protected from loss, theft, or misuse. To assist in implementation and internal controls, the Director of Finance has established an Investment Group and a Review Group.

The Investment Group, which is comprised of the Director of Finance and his/her designees, is responsible for maintenance of the investment guidelines and Approved Lists. These guidelines and lists can be altered daily, if needed, to adjust to the ever-changing financial markets. The guidelines can be more conservative or match the policy language. In no case can the guidelines override the Policy.

The Review Group, which is comprised of the Director of Finance and his/her designees, is responsible for the monthly review and appraisal of all the investments purchased by the Director of Finance and staff. This review includes bond proceeds, which are invested separately from the Pooled Investment Fund and are not governed by this Policy.

The Director of Finance shall establish a process for daily, monthly, quarterly, and annual review and monitoring of the Pooled Investment Fund activity. The following articles, in order of supremacy, govern the Pooled Investment Fund:

1. California Government Code
2. Annual Investment Policy
3. Current Investment Guidelines
4. Approved Lists (see page 9, Section IX.K)

The Director of Finance shall review the daily investment activity and corresponding bank balances.

Monthly, the Review Group shall review all investment activity and its compliance to the corresponding governing articles and investment objectives.

Quarterly, the Director of Finance will provide the Oversight Committee with a copy of the Pooled Investment Fund activity and its compliance to the annual Policy and California Government Code.

Annually, the Oversight Committee shall cause an annual audit of the activities within the Pooled Investment Fund to be conducted to determine compliance to the Policy and California Government Code. This audit will include issues relating to the structure of the investment portfolio and risk.

All securities purchased, with the exception of bank deposits, money market mutual funds, and LAIF, shall be delivered to the independent third-party custodian selected by the Director of Finance. This includes all collateral for repurchase agreements. All trades, where applicable, will be executed by delivery versus payment by the designated third-party custodian.

VIII. Sacramento County Treasury Oversight Committee

In accordance with California Government Code section 27130 et seq., the Board of Supervisors, in consultation with the Director of Finance, has created the Sacramento County Treasury Oversight Committee (Oversight Committee). Annually, the Director of Finance shall prepare an Investment Policy that will be forwarded to and monitored by the Oversight Committee and rendered to Boards of all local agency participants. The Board of Supervisors shall review and approve the Policy during public session. Quarterly, the Director of Finance shall provide the Oversight Committee a report of all investment activities of the Pooled Investment Fund to ensure compliance to the Policy. Annually, the Oversight Committee shall cause an audit to be conducted on the Pooled Investment Fund. The meetings of the Oversight Committee shall be open to the public and subject to the Ralph M. Brown Act.

A member of the Oversight Committee may not be employed by an entity that has contributed to the campaign of a candidate for the office of local treasurer, or contributed to the campaign of a candidate to be a member of a legislative body of any local agency that has deposited funds in the county treasury, in the previous three years or during the period that the employee is a member of the Oversight Committee. A member may not directly or indirectly raise money for a candidate for local treasurer or a member of the Sacramento County Board of Supervisors or governing board of any local agency that has deposited funds in the county treasury while a member of the Oversight Committee. Finally, a member may not secure employment with, or be employed by bond underwriters, bond counsel, security brokerages or dealers, or financial services firms, with whom the treasurer is doing business during the period that the person is a member of the Oversight Committee or for one year after leaving the committee.

The Oversight Committee is not allowed to direct individual investment decisions, select individual investment advisors, brokers or dealers, or impinge on the day-to-day operations of the Department of Finance treasury and investment operations.

IX. Investment Parameters

A. Investable Funds

Total Investable Funds (TIF) for purposes of this Policy are all Pooled Investment Fund moneys that are available for investment at any one time, including the estimated bank account float. Included in TIF are funds of outside investors, if applicable, for which the Director of Finance provides investment services. Excluded from TIF are all funds held in separate portfolios.

The Cash Flow Horizon is the period in which the Pooled Investment Fund cash flow can be reasonably forecasted. This Policy establishes the Cash Flow Horizon to be one (1) year.

Once the Director of Finance has deemed that the cash flow forecast can be met, the Director of Finance may invest funds with maturities beyond one year. These securities will be referred to as the Core Portfolio.

B. Authorized Investments

Authorized investments shall match the general categories established by the California Government Code sections 53601 et seq. and 53635 et seq. Authorized investments shall include, in accordance with California Government Code section 16429.1, investments into LAIF. Authorization for specific instruments within these general categories, as well as narrower portfolio concentration and maturity limits, will be established and maintained by the Investment Group as part of the Investment Guidelines. As the California Government Code is amended, this Policy shall likewise become amended.

C. Prohibited Investments

No investments shall be authorized that have the possibility of returning a zero or negative yield if held to maturity. These shall include inverse floaters, range notes, and interest only strips derived from a pool of mortgages.

All legal investments issued by a tobacco-related company are prohibited. A tobacco-related company is defined as an entity that makes smoking products from tobacco used in cigarettes, cigars, or snuff or for smoking in pipes. The tobacco-related issuers restricted from any investment are any component companies in the Dow Jones U.S. Tobacco Index or the NYSE Arca Tobacco Index. Annually the Director of Finance and/or his designee will update the list of tobacco-related companies.

D. Credit Requirements

Except for municipal obligations and Community Reinvestment Act (CRA) bank deposits and certificates of deposit, the issuer's short-term credit ratings shall be at or above A-1 by Standard & Poor's, P-1 by Moody's, and, if available, F1 by Fitch, and the issuer's long-term credit ratings shall be at or above A by Standard & Poor's, A2 by Moody's, and, if available, A by Fitch. There are no credit requirements for Registered State Warrants. All other municipal obligations shall be at or above a short-term rating of SP-1 by Standard & Poor's, MIG1 by Moody's, and, if available, F1 by Fitch. In addition, domestic banks are limited to those with a Fitch Viability rating of a or better, without regard to modifiers. The Investment Group is granted the authority to specify approved California banks with Fitch Viability ratings of bbb+ but they must have a Support rating of 1 where appropriate. Foreign banks with domestic licensed offices must have a Sovereign rating of AAA from Standard and Poor's, Moody's, or Fitch and a Fitch Viability rating of a or better, without regard to modifiers; however, a foreign bank may have a rating of bbb+ but they must have a Support rating of 1. Domestic savings banks must be rated a or better, without regard to modifiers, or may have a rating of bbb+ but they must a Support rating of 1.

Community Reinvestment Act Program Credit Requirements

<table>
<tr><th>Maximum Amount</th><th colspan="3">Minimum Requirements</th></tr>
<tr><td rowspan="2">Up to the FDIC- or NCUSIF-insured limit for the term of the deposit</td><td colspan="3"><u>Banks</u> — FDIC Insurance Coverage</td></tr>
<tr><td colspan="3"><u>Credit Unions</u> — NCUSIF Insurance Coverage
Credit unions are limited to a maximum deposit of the NCUSIF-insured limit since they are not rated by nationally recognized rating agencies and are not required to provide collateral on public deposits.</td></tr>
<tr><td>Over the FDIC- or NCUSIF-insured limit</td><td>(Any 2 of 3 ratings)
S&P: A-2
Moody's: P-2
Fitch: F-2

Collateral is required</td><td>OR</td><td>Through a private sector entity that assists in the placement of deposits to achieve FDIC insurance coverage of the full deposit and accrued interest.</td></tr>
</table>

Eligible banks must have Community Reinvestment Act performance ratings of "satisfactory" or "outstanding" from each financial institution's regulatory authority. In addition, deposits greater than the federally-insured amount must be collateralized. Banks must place securities worth between 110% and 150% of the value of the deposit with the Federal Reserve Bank of San Francisco, the Home Loan Bank of San Francisco, or a trust bank.

Since credit unions do not have Community Reinvestment Act performance ratings, they must demonstrate their commitment to meeting the community reinvestment lending and charitable activities, which are also required of banks.

All commercial paper and medium-term note issues must be issued by corporations operating within the United States and having total assets in excess of one billion dollars ($1,000,000,000).

The Investment Group may raise these credit standards as part of the Investment Guidelines and Approved Lists. Appendix A provides a Comparison and Interpretation of Credit Ratings by Standard & Poor's, Moody's, and Fitch.

E. Maximum Maturities

Due to the nature of the invested funds, no investment with limited market liquidity should be used. Appropriate amounts of highly-liquid investments, such as Treasury and Agency securities, should be maintained to accommodate unforeseen withdrawals.

The maximum maturity, determined as the term from the date of ownership to the date of maturity, for each investment shall be established as follows:

U.S. Treasury and Agency Obligations	5 years
Washington Supranational Obligations[1]	5 years
Municipal Notes	5 years
Registered State Warrants	5 years
Bankers Acceptances	180 days
Commercial Paper	270 days
Negotiable Certificates of Deposit	180 days
CRA Bank Deposit/Certificates of Deposit	1 year
Repurchase Agreements	1 year
Reverse Repurchase Agreements	92 days
Medium-Term Corporate Notes	180 days
Collateralized Mortgage Obligations	180 days

The Investment Group may reduce these maturity limits to a shorter term as part of the Investment Guidelines and the Approved Lists.

The ultimate maximum maturity of any investment shall be five (5) years. The dollar-weighted average maturity of all securities shall be equal to or less than three (3) years.

F. Maximum Concentrations

No more than 80% of the portfolio may be invested in issues other than United States Treasuries and Government Agencies. The maximum allowable percentage for each type of security is set forth as follows:

U.S. Treasury and Agency Obligations	100%
Municipal Notes	80%
Registered State Warrants	80%
Bankers Acceptances	40%
Commercial Paper	40%
Washington Supranational Obligations	30%
Negotiable Certificates of Deposit and CRA Bank Deposit/Certificates of Deposit	30%
Repurchase Agreements	30%
Reverse Repurchase Agreements	20%
Medium-Term Corporate Notes	30%
Money Market Mutual Funds	20%
Collateralized Mortgage Obligations	20%
Local Agency Investment Fund (LAIF)	(per State limit)

The Investment Group may reduce these concentrations as part of the Investment Guidelines and the Approved Lists.

[1] The International Bank for Reconstruction and Development, International Finance Corporation, and Inter-American Development Bank.

No more than 10% of the portfolio, except Treasuries and Agencies, may be invested in securities of a single issuer including its related entities.

Where a percentage limitation is established above, for the purpose of determining investment compliance, that maximum percentage will be applied on the date of purchase.

G. Repurchase Agreements

Under California Government Code section 53601, paragraph (j) and section 53635, the Director of Finance may enter into Repurchase Agreements and Reverse Repurchase Agreements. The maximum maturity of a Repurchase Agreement shall be one year. The maximum maturity of a reverse repurchase agreement shall be 92 days, and the proceeds of a reverse repurchase agreement may not be invested beyond the expiration of the agreement. The reverse repurchase agreement must be "matched to maturity" and meet all other requirements in the code.

All repurchase agreements must have an executed Sacramento County Master Repurchase Agreement on file with both the Director of Finance and the Broker/Dealer. Repurchase Agreements executed with approved broker-dealers must be collateralized with either: (1) U.S. Treasuries or Agencies with a market value of 102% for collateral marked to market daily; or (2) money market instruments which are on the Approved Lists of the County and which meet the qualifications of the Policy, with a market value of 102%. Since the market value of the underlying securities is subject to daily market fluctuations, investments in repurchase agreements shall be in compliance if the value of the underlying securities is brought back up to 102% no later than the next business day. Use of mortgage-backed securities for collateral is not permitted. Strictly for purposes of investing the daily excess bank balance, the collateral provided by the Sacramento County's depository bank can be Treasuries or Agencies valued at 110%, or mortgage-backed securities valued at 150%.

H. Community Reinvestment Act Program

The Director of Finance has allocated within the Pooled Investment Fund, a maximum of $90 million for the Community Reinvestment Act Program to encourage community investment by financial institutions, which includes community banks and credit unions, and to acknowledge and reward local financial institutions which support the community's financial needs. The Director of Finance may increase this amount, as appropriate, while staying within the investment policy objectives and maximum maturity and concentration limits. The eligible banks and savings banks must have Community Reinvestment Act performance ratings of "satisfactory" or "outstanding" from each financial institution's regulatory authority. The minimum credit requirements are located on page 5 of Section IX.D.

I. Criteria and Qualifications of Brokers/Dealers and Direct Issuers

All transactions initiated on behalf of the Pooled Investment Fund and Sacramento County shall be executed through either government security dealers reporting as primary dealers to the Market Reports Division of the Federal Reserve Bank of New York or direct issuers that directly issue their own securities which have been placed on the Approved List of

brokers/dealers and direct issuers. Further, these firms must have an investment grade rating from at least two national rating services, if available.

Brokers/Dealers and direct issuers which have exceeded the political contribution limits, as contained in Rule G-37 of the Municipal Securities Rulemaking Board, within the preceding four-year period to the Director of Finance, any member of the Board of Supervisors, or any candidate for the Board of Supervisors, are prohibited from the Approved List of brokers/dealers and direct issuers.

Each broker/dealer and direct issuer will be sent a copy of this Policy and a list of those persons authorized to execute investment transactions. Each firm must acknowledge receipt of such materials to qualify for the Approved List of brokers/dealers and direct issuers.

Each broker/dealer and direct issuer authorized to do business with Sacramento County shall, at least annually, supply the Director of Finance with audited financial statements.

J. Investment Guidelines, Management Style and Strategy

The Investment Group, named by the Director of Finance, shall issue and maintain Investment Guidelines specifying authorized investments, credit requirements, permitted transactions, and issue maturity and concentration limits which are consistent with this Policy.

The Investment Group shall also issue a statement describing the investment management style and current strategy for the entire investment program. The management style and strategy can be changed to accommodate shifts in the financial markets, but at all times they must be consistent with this Policy and its objectives.

K. Approved Lists

The Investment Group, named by the Director of Finance, shall issue and maintain various Approved Lists. These lists are:

1. Approved Domestic Banks for all legal investments.
2. Approved Foreign Banks for all legal investments.
3. Approved Commercial Paper and Medium Term Note Issuers.
4. Approved Money Market Mutual Funds.
5. Approved Firms for Purchase or Sale of Securities (Brokers/Dealers and Direct Issuers).
6. Approved Banks / Credit Unions for the Community Reinvestment Act Program.

L. Calculation of Yield and Costs

The costs of managing the investment portfolio, including but not limited to: investment management; accounting for the investment activity; custody of the assets; managing and accounting for the banking; receiving and remitting deposits; oversight controls; and indirect and overhead expenses are charged to the investment earnings based upon actual labor hours worked in respective areas. Costs of these respective areas are accumulated by specific cost

accounting projects and charged to the Pooled Investment Fund on a quarterly basis throughout the fiscal year.

The Department of Finance will allocate the net interest earnings of the Pooled Investment Fund quarterly. The net interest earnings are allocated based upon the average daily cash balance of each Pooled Investment Fund participant.

X. Reviewing, Monitoring and Reporting of the Portfolio

The Review Group will prepare and present to the Director of Finance at least monthly a comprehensive review and evaluation of the transactions, positions, performance of the Pooled Investment Fund and compliance to the California Government Code, Policy, and Investment Guidelines.

Quarterly, the Director of Finance will provide to the Oversight Committee and to any local agency participant that requests a copy, a detailed report on the Pooled Investment Fund. Pursuant to California Government Code section 53646, the report will list the type of investments, name of issuer, maturity date, par and dollar amount of the investment. For the total Pooled Investment Fund, the report will list average maturity, the market value, and the pricing source. Additionally, the report will show any funds under the management of contracting parties, a statement of compliance to the Policy and a statement of the Pooled Investment Fund's ability to meet the expected expenditure requirements for the next six months.

Each quarter, the Director of Finance shall provide to the Board of Supervisors and interested parties a comprehensive report on the Pooled Investment Fund.

Annually, the Director of Finance shall provide to the Oversight Committee the Investment Policy. Additionally, the Director of Finance will render a copy of the Investment Policy to the legislative body of the local agencies that participate in the Pooled Investment Fund.

XI. Withdrawal Requests for Pooled Fund Investors

The Director of Finance will honor all requests to withdraw funds for normal cash flow purposes that are approved by the Director of Finance at a one dollar net asset value. Any requests to withdraw funds for purposes other than immediate cash flow needs, such as for external investing, are subject to the consent of the Director of Finance. In accordance with California Government Code Sections 27133(h) and 27136, such requests for withdrawals must first be made in writing to the Director of Finance. When evaluating a request to withdraw funds, the Director of Finance will take into account the effect of a withdrawal on the stability and predictability of the Pooled Investment Fund and the interests of other depositors. Any withdrawal for such purposes will be at the market value of the Pooled Investment Fund on the date of the withdrawal.

XII. Limits on Honoraria, Gifts, and Gratuities

In accordance with California Government Code Section 27133(d), this Policy establishes limits for the Director of Finance; individuals responsible for management of the portfolios; and members of the Investment Group and Review Group who direct individual investment decisions,

select individual investment advisors and broker/dealers, and conduct day-to-day investment trading activity. The limits also apply to members of the Oversight Committee. Any individual who receives an aggregate total of gifts, honoraria and gratuities in excess of $50 in a calendar year from a broker/dealer, bank or service provider to the Pooled Investment Fund must report the gifts, dates and firms to the designated filing official and complete the appropriate State forms.

No individual may receive aggregate gifts, honoraria, and gratuities from any single source in a calendar year in excess of the amount specified in Section 18940.2(a) of Title 2, Division 6 of the California Code of Regulations. This limitation is $500 for the period January 1, 2019, to December 31, 2020, and is adjusted for inflation every odd-numbered year. Any violation must be reported to the State Fair Political Practices Commission.

XIII. Terms and Conditions for Outside Investors

Outside investors may invest in the Pooled Investment Fund through California Government Code Section 53684. Their deposits are subject to the consent of the Director of Finance. The legislative body of the local agency must approve the Sacramento County Pooled Investment Fund as an authorized investment and execute a Memorandum of Understanding. Any withdrawal of these deposits must be made in writing 30 days in advance and will be paid based upon the market value of the Pooled Investment Fund. If the Director of Finance considers it appropriate, the deposits may be returned at any time to the local agency.

Appendix A

Comparison and Interpretation of Credit Ratings

Long Term Debt & Individual Bank Ratings				
Rating Interpretation	**Moody's**	**S&P**	**Fitch**	**Fitch Viability Rating**
Best-quality grade	Aaa	AAA	AAA	aaa
High-quality grade	Aa1 Aa2 Aa3	AA+ AA AA-	AA+ AA AA-	aa+ aa aa-
Upper Medium Grade	A1 A2 A3	A+ A A-	A+ A A-	a+ a a-
Medium Grade	Baa1 Baa2 Baa3	BBB+ BBB BBB-	BBB+ BBB BBB-	bbb+ bbb bbb-
Speculative Grade	Ba1 Ba2 Ba3	BB+ BB BB-	BB+ BB BB-	bb+ bb bb-
Low Grade	B1 B2 B3	B+ B B-	B+ B B-	b+ b b-
Poor Grade to Default	Caa	CCC+	CCC	ccc
In Poor Standing	- -	CCC CCC-	- -	
Highly Speculative Default	Ca C	CC -	CC -	cc c
Default	- - -	- - D	DDD DD D	f f f

Short Term / Municipal Note Investment Grade Ratings			
Rating Interpretation	**Moody's**	**S&P**	**Fitch**
Superior Capacity	MIG-1	SP-1+/SP-1	F1+/F1
Strong Capacity	MIG-2	SP-2	F2
Acceptable Capacity	MIG-3	SP-3	F3

Appendix A

Short Term / Commercial Paper Investment Grade Ratings			
Rating Interpretation	**Moody's**	**S&P**	**Fitch**
Superior Capacity	P-1	A-1+/A-1	F1+/F1
Strong Capacity	P-2	A-2	F2
Acceptable Capacity	P-3	A-3	F3

Fitch Support Ratings	
Rating	*Interpretation*
1	A bank for which there is an extremely high probability of external support. The potential provider of support is very highly rated in its own right and has a very high propensity to support the bank in question. This probability of support indicates a minimum Long-Term Rating floor of 'A-'.
2	A bank for which there is a high probability of external support. The potential provider of support is highly rated in its own right and has a high propensity to provide support to the bank in question. This probability of support indicates a minimum Long-Term Rating floor of 'BBB-'.
3	A bank for which there is a moderate probability of support because of uncertainties about the ability or propensity of the potential provider of support to do so. This probability of support indicates a minimum Long-Term Rating floor of 'BB-'.
4	A bank for which there is a limited probability of support because of significant uncertainties about the ability or propensity of any possible provider of support to do so. This probability of support indicates a minimum Long-Term Rating floor of 'B'.
5	A bank for which external support, although possible, cannot be relied upon. This may be due to a lack of propensity to provide support or to very weak financial ability to do so. This probability of support indicates a Long-Term Rating floor no higher than 'B-' and in many cases no floor at all.

Appendix A

Fitch Sovereign Risk Ratings	
Rating	*Interpretation*
AAA	**Highest credit quality.** 'AAA' ratings denote the lowest expectation of default risk. They are assigned only in cases of exceptionally strong capacity for payment of financial commitments. This capacity is highly unlikely to be adversely affected by foreseeable events.
AA	**Very high credit quality.** 'AA' ratings denote expectations of very low default risk. They indicate very strong capacity for payment of financial commitments. This capacity is not significantly vulnerable to foreseeable events.
A	**High credit quality.** 'A' ratings denote expectations of low default risk. The capacity for payment of financial commitments is considered strong. This capacity may, nevertheless, be more vulnerable to adverse business or economic conditions than is the case for higher ratings.
BBB	**Good credit quality.** 'BBB' ratings indicate that expectations of default risk are currently low. The capacity for timely payment of financial commitments is considered adequate but adverse business or economic conditions are more likely to impair this capacity.
BB	**Speculative.** 'BB' ratings indicate an elevated vulnerability to default risk, particularly in the event of adverse changes in business or economic conditions over time.
B	**Highly speculative.** 'B' ratings indicate that material default risk is present, but a limited margin of safety remains. Financial commitments are currently being met; however, capacity for continued payment is vulnerable to deterioration in the business and economic environment.
CCC	**High default risk.** Default is a real possibility.
CC	**Very high levels of credit risk.** Default of some kind appears probable.
C	**Exceptionally high levels of credit risk.** Default appears imminent or inevitable.
D	**Default.** Indicates a default. Default generally is defined as one of the following: • Failure to make payment of principal and/or interest under the contractual terms of the rated obligation; • The bankruptcy filings, administration, receivership, liquidation or other winding-up or cessation of the business of an issuer/obligor; or • The coercive exchange of an obligation, where creditors were offered securities with diminished structural or economic terms compared with the existing obligation.

San Juan USD
Board Policy
Intradistrict Open Enrollment

BP 5116.1
Students

The governing board desires to provide enrollment options that meet the diverse needs and interests of district students. The superintendent or designee shall establish procedures for the selection and transfer of students among district schools in accordance with law, board policy, and administrative regulation.

(cf. 5117 - Interdistrict Attendance)

The parents/guardians of any student who resides within district boundaries may apply to enroll their child in any district school, regardless of the location of residence within the district. (Education Code section 35160.5)

(cf. 5111.1 - District Residency)

The board shall annually review this policy. (Education Code sections 35160.5, 48980)

In order to ensure that priorities for enrollment in district schools are implemented in accordance with law, applications for intradistrict open enrollment shall be submitted between the first Monday in December and the third Friday in January of the school year preceding the school year for which the transfer is requested.

Enrollment Priorities

Priority for attendance outside a student's attendance area shall be given as follows:

1. If, while on school grounds, a student becomes the victim of a violent criminal offense, he/she shall be provided an option to transfer to another district school. (20 USC 7912)

2. If a student attends a school designated by the California Department of Education as "persistently dangerous," he/she shall be provided an option to transfer to another district school or charter school. (20 USC 7912; 5 CCR 11992)

3. The superintendent or designee may approve a student's transfer to a district school that is at capacity and otherwise closed to transfers upon finding that special circumstances exist that might be harmful or dangerous to the student in the current attendance area, including, but not limited to, threats of bodily harm or threats to the emotional stability of the student.

To grant priority under these special circumstances, the superintendent or designee must

have received either: (Education Code section 35160.5)

a. A written statement from a representative of an appropriate state or local agency, such as a law enforcement official, social worker, or a properly licensed or registered professional, such as a psychiatrist, psychologist, or marriage and family therapist

b. A court order, including a temporary restraining order and injunction.

4. Priority may be given to siblings of students already in attendance in that school.

5. Priority may be given to any student whose parent/guardian is assigned to that school as his/her primary place of employment.

No student who currently resides in the attendance area of a school shall be displaced by students transferring from outside the attendance area. (Education Code section 35160.5)

For all other applications for enrollment from outside a school's attendance area, the superintendent or designee shall use a random, unbiased selection process to determine who shall be admitted whenever the school receives admission requests that are in excess of the school's capacity. A school's capacity shall be calculated in a nonarbitrary manner using student enrollment and available space. (Education Code section 35160.5)

Enrollment decisions shall not be based on a student's academic or athletic performance, except that existing entrance criteria for specialized schools or programs may be used provided that the criteria are uniformly applied to all applicants. Academic performance may be used to determine eligibility for, or placement in, programs for gifted and talented students. (Education Code section 35160.5)

(cf. 6172 - Gifted and Talented Student Program)

Students who qualify to transfer under the Open Enrollment Act ("Romero Bill") will be processed pursuant to Education Code sections 48350-48361.

(cf. 5116 - School Attendance Boundaries)

Transportation

Except as required by 20 USC 6316 for transfers out of Title I program improvement schools, the district shall not be obligated to provide transportation for students who attend school outside their attendance area.

(cf. 3540 - Transportation)

Legal Reference:

EDUCATION CODE
200 Prohibition against discrimination
35160.5 District policies; rules and regulations
35291 Rules
35351 Assignment of students to particular schools
46600-46611 Interdistrict attendance agreements
48200 Compulsory attendance
48204 Residency requirements for school attendance
48300-48316 Student attendance alternatives, school district of choice program
48350-48361 Open Enrollment Act
48980 Notice at beginning of term
CODE OF REGULATIONS, TITLE 5
11992-11994 Definition of persistently dangerous schools
UNITED STATES CODE, TITLE 20
6316 Transfers from program improvement schools
7912 Transfers from persistently dangerous schools
CODE OF FEDERAL REGULATIONS, TITLE 34
200.36 Dissemination of information
200.37 Notice of program improvement status, option to transfer
200.39 Program improvement, transfer option
200.42 Corrective action, transfer option
200.43 Restructuring, transfer option
200.44 Public school choice, program improvement schools
200.48 Transportation funding for public school choice
COURT DECISIONS
Crawford v. Huntington Beach Union High School District, (2002) 98 Cal.App.4th 1275
ATTORNEY GENERAL OPINIONS
85 Ops.Cal.Atty.Gen. 95 (2002)

Management Resources:
U.S. DEPARTMENT OF EDUCATION NONREGULATORY GUIDANCE
Public School Choice, January 2009
Unsafe School Choice Option, May 2004
WEB SITES
CSBA: http://www.csba.org
California Department of Education, Unsafe School Choice Option:
http://www.cde.ca.gov/ls/ss/se/usco.asp
U.S. Department of Education, No Child Left Behind: http://www.nclb.gov

Policy SAN JUAN UNIFIED SCHOOL DISTRICT
adopted: October 26, 2010 Carmichael, California
effective: October 27, 2010
revised: March 22, 2011
revised: January 28, 2014

revised: October 11, 2016
revised: February 12, 2019

San Juan USD

Board Policy

Parent Involvement And Family Engagement

BP 6020
Instruction

The governing board recognizes that parents/guardians are their children's first and most influential teachers and that sustained parent/guardian involvement in the education of their children contributes greatly to student achievement and a positive school environment. The superintendent or designee shall consult with staff and parents/guardians and family members to jointly develop meaningful opportunities at all grade levels for parents/guardians to be involved in district and school activities; advisory, decision-making and advocacy roles and activities to support learning at school and at home.

(cf. 0420 - School Site Councils)
(cf. 0420.1 - School-Based Program Coordination)
(cf. 0420.5 - Site Based Management)
(cf. 1220 - Citizen Advisory Committees)
(cf. 1230 - School-Connected Organizations)
(cf. 1240 - Volunteer Assistance)
(cf. 1250 - Visits to the Schools)

Parents/guardians shall be notified of their rights to be informed about and to participate in their children's education and of the opportunities available to them to do so

(cf. 5020 Parent Rights and Responsibilities)

The district's local control and accountability plan shall include goals and strategies for parent/guardian engagement, including district efforts to seek parent/guardian input in district and school site decision making and to promote parent/guardian participation in programs for English learners, foster youth, students eligible for free and reduced-price meals, and students with disabilities. (Education Code Sections 42238.02, 52060)

(cf. 0460 – Local Control and Accountability Plan)The superintendent or designee shall regularly evaluate and report to the board on the effectiveness of the district's parent/guardians and family engagement efforts, including, but not limited to, input from parents/guardians, family members, and school staff on the adequacy of involvement opportunities and on barriers that may inhibit participation.

(c.f. 0500 – Review and Evaluation)

Title I Schools

The superintendent or designee shall involve parents/guardians and family members in establishing district expectations and objectives for meaningful parent/guardian and family engagement in schools supported by Title I funding, developing strategies that describe how the district will carry out each activity listed in 20 USC 6318, as contained in accompanying administrative regulation, and implementing and evaluating such programs activities, and procedures. As appropriate, the superintendent or designee shall conduct outreach to all parents/guardians and family members. (Education Code Section 11503; 20 USC 6318)

(cf. 6171 - Title I Programs)

Board shall reserve at least one percent of the funding to implement parent/guardian and family engagement activities. The superintendent or designee shall involve parents/guardians and family members of participating students in decisions regarding how the district's Title I funds will be allotted for parent/guardian and family engagement activities and shall ensure that priority is given to schools in high poverty areas in accordance with law. (20 USC 6318, 6631)

(cf. 3100 Budget)

Expenditures of such funds shall be consistent with the activities specified in this policy and shall include at least one of the following: (20 USC 6318)

1. Support for schools and nonprofit organizations in providing professional development for district and school staff regarding parent/guardian and family engagement strategies, which may be provided jointly to teachers, principals, other school leaders, specialized instructional support personnel, paraprofessionals, early childhood educators, and parents/guardians and family members

2. Support for programs that reach parents/guardians and family members at home, in the community, and at school

3. Dissemination of information on best practices focused on parent/guardian and family engagement, especially best practices for increasing the engagement of economically disadvantaged parents/guardians and family members

4. Collaboration with community-based or other organizations or employers with a record of success in improving and increasing parent and family engagement

5. Any other activities and strategies that the district determines are appropriate and consistent with this policy

The superintendent or designee shall ensure that each school receiving Title I funds develops a school-level parent/guardian and family engagement policy in accordance with 20 USC 6318.

Non-Title I Schools

The superintendent or designee shall develop and implement strategies applicable to each school that does not receive federal Title I funds to encourage the involvement and support of parents/guardians in the education of their children, including, but not limited to, strategies describing how the district and schools will address the purposes and goals described in Education Code section 11502. (Education Code section 11504)

Legal Reference:
EDUCATION CODE
11500-11506 Programs to encourage parent involvement
48985 Notices in languages other than English
51101 Parent rights and responsibilities
52060-52077 Local control accountability plan
54444.1 – 54444.2 Parent advisory councils, services to migrant children
56190-56194 Community advisory committee, special education
64001 Single plan for student achievement
LABOR CODE
230.8 Time off to visit child's school
CODE OF REGULATIONS, TITLE 5
18275 Child care and development programs, parent involvement and education
UNITED STATES CODE, TITLE 20
6311 State plan
6312 Local educational agency plan
6314 School-wide programs

6318 Parent and family engagement
6631 Teacher and school leader incentive program, purposes and definitions
CODE OF FEDERAL REGULATIONS, TITLE 28
35.104 Definitions, auxiliary aids and services
35.160 Communications

Management Resources:

CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS
Title I School-Level Parental Involvement Policy
Family Engagement Framework: A Tool for California Districts, 2014

U.S. DEPARTMENT OF EDUCATION PUBLICATIONS
Parental Involvement: Title I, Part A Non-Regulatory Guidance, April 23, 2004

WEBSITES
CSBA: http://www.csba.org
California Department of Education, Family, School, Community Partnerships: http://www.cde.ca.gov/ls/pf

California Parent Center: http://parent.sdsu.edu
California State PTA: http://www.capta.org
National Coalition for Parent Involvement in Education: http://www.ncpie.org
National PTA: http://www.pta.org

Parent Information and Resource Centers: http://www.pirc-info.net
Parents as Teachers National Center: http://www.parentsasteachers.org
U.S. Department of Education: http://www.ed.gov

Policy SAN JUAN UNIFIED SCHOOL DISTRICT
adopted: June 9, 1992 Carmichael, California
revised: December 12, 2006
revised: February 27, 2007
revised: March 22, 2011
revised: September 24, 2013
revised: January 24, 2017
revised: April 9, 2019

San Juan USD

Board Policy

Extracurricular And Cocurricular Activities

BP 6145
Instruction

(Excluding 9th through 12th Grade Athletics Activities/Interscholastic Competition)

The governing board recognizes that extracurricular and cocurricular activities enrich the educational and social development and experiences of students and enhance students' feelings of connectedness with the schools. ~~–~~The district shall encourage and support student participation in extracurricular and ~~/~~cocurricular activities without compromising the integrity and purpose of the educational program.

(cf. 1330 - Use of District Facilities and Grounds)
(cf. 6145.2 - Interscholastic Competition)

Prerequisites for student participation in extracurricular and cocurricular activities shall be limited to those ~~prerequisites~~ that have been demonstrated to be essential to the success of the ~~particular~~ activity. No extracurricular or cocurricular program or activity shall be provided or conducted separately on the basis of any actual or perceived characteristic listed as a prohibited category of discrimination in state or federal law, nor shall any student's participation in an extracurricular or cocurricular activity be required or refused on those bases. ~~Prerequisites for participation in extracurricular and cocurricular activities shall be limited to those prerequisites that have been demonstrated to be essential to the success of the particular activity.~~ (5 CCR 4925)

(cf. 0410 - Nondiscrimination in District Programs and Activities)
(cf. 5145.3 - Nondiscrimination/Harassment)
(cf. 5145.7 - Sexual Harassment)

Any complaint ~~regarding~~ alleging unlawful discrimination in the district's extracurricular ~~and~~ or cocurricular programs or activities shall be filed in accordance with BP/AR 1312.3 - Uniform Complaint Procedures.

(cf. 1312.3 - Uniform Complaint Procedures)

Unless specifically authorized by law, no student shall be charged a fee for their~~his/her~~ participation in educational activities, ~~be prohibited from participating in~~ including extracurricular and cocurricular activities and materials or equipment related to ~~the educational program because of inability to pay fees associated with the activity, including materials or equipment related to the activity~~ such activities. (Education Code sections 49010, 49011)~~.~~

(cf. 3260 - Fees and Charges) (Students))
(cf. 3452 – Student Activity Funds ~~(Students))~~

Eligibility Requirements

To be eligible to participate in extracurricular and cocurricular activities ~~(excluding 9th through 12th grade athletics activities/Interscholastic Competition)~~, students in grades 7 through 12 must demonstrate satisfactory educational progress in the previous grading period including but not limited to: (Education Code section 35160.5)

1. Maintenance of a minimum 2.0 grade point average on a 4.0 scale in all enrolled classes

2. Maintenance of minimum progress toward meeting high school graduation requirements

(cf. 5121 – Examination/Grading/Rating)
(cf. 6146.1 - High School Graduation Requirements)

The superintendent or designee may grant ineligible students a probationary period ~~of not more than~~ not to exceed one semester. ~~–~~Students granted probationary eligibility must meet the required standards by the end of the probationary period in order to remain eligible for participation. ~~–~~(Education Code section 35160.5)

~~The superintendent or designee shall provide the necessary assistance to help ineligible students achieve the academic standards required by law.~~

~~(cf. 6176 - Weekend/Saturday Classes)~~
~~(cf. 6177 - Summer School)~~

Any decision regarding the eligibility of a~~ny~~ homeless ~~child~~ student, ~~any child in~~ foster youth ~~care~~, or a child of an active duty ~~-~~military family for extracurricular or cocurricular activities shall be made by the superintendent or designee in accordance with Education Code sections 48850 and 49701.

(cf. 6173 - Education for Homeless Children)

The superintendent or designee may revoke a student's eligibility for participation in extracurricular and cocurricular activities when the student's poor citizenship is serious enough to warrant loss of this privilege.

Student Conduct at Extracurricular/Cocurricular Events

When attending or participating in extracurricular and~~/or~~ cocurricular activities on or off campus, district students are subject to district policies and regulations relating to student conduct. Students who violate district policies and regulations may be subject to discipline including, but not limited to, suspension, expulsion, transfer to alternative programs, or denial of participation

in extracurricular or cocurricular activities in accordance with bBoard policy and administrative regulation. –When appropriate, the superintendent or designee shall notify local law enforcement.

(cf.5131 – Conduct)
(cf. 5131.1 - Bus Conduct)
(cf. 5144 - Discipline)
(cf. 5144.1 - Suspension and Expulsion/Due Process)
(cf. 5144.2 - Suspension and Expulsion/Due Process (Individuals With Exceptional Needs))

Annual Policy Review

The bBoard shall annually review this policy and the ~~administrative~~ implementing regulations ~~annually~~. Education Code section 35160.5

Legal Reference:
EDUCATION CODE
35145 Public meetings
35160.5 District policy rules and regulations; requirements; matters subject to regulation
35179 Interscholastic athletics; associations or consortia
35181 Students' responsibilities
48850 Participation of homeless students and foster youth in extracurricular activities and interscholastic sports
48930-48938 Student organizations
49010-49013 Student fees
49024 Activity Supervisor Clearance Certificate
49700-4970~~4~~3 – Education of children of military families
CALIFORNIA CONSTITUTION
Article 9, Section 5 Common school system
CODE OF REGULATIONS, TITLE 5
350 Fees not permitted
4900-4965 Nondiscrimination in elementary and secondary education programs receiving state financial assistance
5531 Supervision of extracurricular activities of pupils
UNITED STATES CODE, TITLE 42
2000h-2-2000h-6 Title IX, 1972 Education Act Amendments
COURT DECISIONS
Hartzell v. Connell, (1984) 35 Cal. 3d 899

Management Resources:
~~CALIFORNIA TASK FORCE REPORT TO THE LEGISLATURE~~
~~Compact on Educational Opportunity for Military Children: Preliminary Final Report, March 2009~~
CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS

Pupil Fees, Deposits, or Other Charges, Fiscal Management Advisory ~~11~~12-~~01~~02, ~~November 9~~April 24, 2013~~, 2011~~
CALIFORNIA TASK FORCE REPORT TO THE LEGISLATURE
Compact on Educational Opportunity for Military Children: Preliminary Final Report, March 2009
COMMISSION ON TEACHER CREDENTIALING PUBLICATIONS
Information on Assembly Bill 346 Concerning the Activity Supervisor Clearance Certificate (ASCC), Coded Correspondence 10-11, July 20, 2010
WEB SITES~~.~~
CSBA: http://www.csba.org
California Association of Directors of Activities: http://www.cadal.org
California Department of Education~~, Educational Options Office~~:
http://www.cde.ca.gov~~/ls/pf/mc~~
~~California Department of Education, Foster Youth Services: http://www.cde.ca.gov/ls/pf/fy/~~
~~CSBA: http://www.csba.org~~
California Interscholastic Federation: http://www.cifstate.org
Commission on Teacher Credentialing: http://www.ctc.ca.gov

(11/09 3/12) 5/17

Policy SAN JUAN UNIFIED SCHOOL DISTRICT
adopted: June 9, 1992 Carmichael, California
revised: March 23, 2010
revised: March 22, 2011
revised: January 22, 2013
revised: January 27, 2015
revised:

SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION

AGENDA ITEM: I-3 (a)

MEETING DATE: 01/28/2020

SUBJECT: Tentative Agreement with the San Juan Teachers Association and the San Juan Unified School District 2019-2020 and 2020-2021

DEPARTMENT: Schools and Labor Relations

CHECK ONE:
For Discussion: ☐
For Action: ☒
Report: ☐
Workshop: ☐
Recognition: ☐
Emergency Action: ☐

ACTION REQUESTED:
The superintendent is recommending that the board approve the San Juan Teachers Association tentative agreement.

RATIONALE/BACKGROUND:
The district shall provide a one-time, off-schedule payment equal to 2% of each member's base salary (Exhibits D1-D4 and F1) and stipends included in contract (Exhibit D9) for the full or partial period between 07/01/2019 to 06/30/2020. The one-time, off-schedule payment will be paid within 60 days of board ratification. This one-time, off-schedule payment will not increase base compensation for that fiscal year.

This tentative agreement was ratified by the San Juan Teachers Association on November 22, 2019.

ATTACHMENTS:
A: Tentative Agreement
B: AB 1200 Public Disclosure of Collective Bargaining Agreement

PREVIOUS STAFF/BOARD ACTION:
Superintendent's Cabinet: 11/11/2019, 11/18/2019
Board of Education: 1/14/2020

FISCAL IMPACT:
Current Budget: See attached AB 1200 Document
Additional Budget: N/A
Funding Source: N/A
(Unrestricted Base, Supplemental, other restricted, etc.)
Current Year Only ☐ Ongoing: ☐

LCAP/STRATEGIC PLAN:
Goal: N/A Focus: N/A
Action: N/A

Strategic Plan: N/A

FINANCIAL DATA:
In accordance with AB 1200 (Chapter 1213/1991); GC 3547.5; and CCR, Title V, Section 15449, Fiscal Services has prepared an analysis of the fiscal impact of the proposed agreement and has submitted it to the Sacramento County Office of Education. Costs to the general fund for the San Juan Teachers Association tentative collective bargaining agreement are: an increase of $4,210,633 in 2019-2020 and a decrease of ($4,210,633) in 2020-2021.

PREPARED BY: Jim Shoemake, Assistant Superintendent, Schools and Labor Relations

APPROVED BY: Kent Kern, Superintendent of Schools

Tentative Agreement
Between
San Juan Unified School District (District)
and the
San Juan Teachers Association (Association)

Article 11 - Salary

The District shall provide a one-time off schedule payment equal to 2.00% of each member's base salary (Exhibits D1-D4 and F1) and stipends included in contract (Exhibit D9) for the full or partial period between 07/01/19 to 06/30/20. The one-time off schedule payment will be paid within 60 days of board ratification. This one-time off schedule payment will not increase base compensation for the 2019-20 fiscal year.

Article 1 - Term

1.06.1 Two (2) year contract for the years 2019-20 and 2020-21

1.06.3 The parties agree to reopen negotiations for the 2020-21 school year. The following will be considered reopeners: Article 11 (Salary), Article 8 (Hours) and Article 9 (Employee Benefits). Unless by mutual agreement, no other Articles will be reopened for the 2020-21 school year. The intent in limiting the scope of the reopeners for the 2020-21 negotiations is to focus on the issues that were revealed by the total compensation comparability study in 2019.

Article 4 - Transfers

4.02.2

e. ~~For the 2018-19 school year, t~~Teachers will receive **notification of** their tentative subject and/or grade level assignment for the ~~2019-20~~ **following** school year no later than the conclusion of the involuntary transfer meetings. Members whose assignment(s) are modified after this date will be notified in accordance with section 4.10.

f. ~~**For the 2018-19 school year,**~~ Elementary Title 1 Schools' **classroom teachers** shall receive notification of tentative subject and/or grade level assignments for the ~~2019-20~~ **for the following** school year at least two working days prior to the start of the Involuntary Transfer notification process detailed in section 4.03.9.

Article 5 - Leaves

Article 5.01.5

5.01.5 Members of the bargaining unit, **whose primary position is not in Adult Education**, shall be granted sick leave on a ratio of one (1) to twenty (20) days for any work performed during summer school, adult education or intersession. Said sick leave shall be accumulated in a special sick leave account (summer school, adult education and intersession). Any unused leave so accumulated shall be applicable to benefits at retirement.

5.33.1 Eligibility
To be eligible an employee must:
c. Donate at least one day of accumulated regular sick leave to the catastrophic sick leave bank during the ~~last~~ **most recent** donation enrollment period. This section may be waived by the Catastrophic Leave Committee.

5.33.2 Donations
To donate, an employee must:
d. Complete the irrevocable donation form during the donation enrollment period **(~~September 1—October 31~~ first day of required service - September 30)** and submit it to the Human Resources Department. Unit members who elect not to join the Catastrophic Sick Leave Bank upon first becoming eligible must wait until the next designated donation enrollment period.

Article 7: Class Size **and Ratios**

Beginning 2020-21

Grade	Loading Ratio	Maximum Class Size
TK – 3	**26**	**27**
4-5(6)	**26**	**29**
(6)7-12	**33**	**36**

7.18 Combo Classes
It is the intent of the District and the Association to provide support to administrators and practitioners when combination classes are unavoidable by providing site administrators and practitioners with a document that they can mutually review prior to the start of the school year. Starting January 1, 2020, before determining who will teach a combination class, staff will give consideration to Exhibit S of the contract. Based on the supports available, a request for volunteers will be made prior to an assignment being made.

7.19 Counselors

The District agrees to provide the following minimal staffing out of base funding. The District or individual sites may choose to enhance with alternative funding sources:

a. **K-8 Schools**
   i. **0.2 FTE per K-8 school**
b. **Middle Schools**
   i. **8.00 FTE for all middle schools**
c. **High Schools**
   i. **1.50 FTE per school with an enrollment of less than 900**
   ii. **2.00 FTE per school with an enrollment of 900-1199**
   iii. **2.50 FTE per school with an enrollment of 1200-1499**
   iv. **3.00 FTE per school with an enrollment of 1500-1799**
   v. **3.50 FTE per school with an enrollment of more than 1799**

7.20 Nurses

The District agrees to provide 17.45 FTE as a minimum number of staffing out of base funding. The District or individual sites may choose to enhance this number with alternative funding sources.

Article 8 - Hours

8.01.18 Compensation for Over Contact Maximum:

Beginning July 1, 2020, the District and the Association agree that the district may exceed the number of daily contacts as capped by contract, provided the following applies:

1) **Elementary TK-3rd:**
   a) **Compensation equates to $25 per student / per day over the maximum class size at the elementary level.**
   b) **Compensation will apply anytime that the district exceeds the class or contact maximums beginning on the 8th day of instruction. Per Article 7.09, during the first 20 days of instruction the District may assign students into the class above the class size maximum. If a student is enrolled on/prior to the 7th day, and remains on the roll sheet at the start of the 8th day of instruction, compensation will be granted retroactively to the first day that actual enrollment exceeded class size maximums.**

c) Due to State guidelines around class size funding, in no cases shall the class size maximums be violated in grades TK-3rd after the 20th day.

2) Elementary 4th-6th (Self-contained classrooms only)
   a) Compensation equates to $25 per student / per day over the maximum class size at the elementary level.
   b) Compensation will apply anytime that the district exceeds the class or contact max beginning on the 8th day of instruction. Per Article 7.09, during the first 20 days of instruction the District may assign students into the class above the class size maximum. After the first 20 days, a member will have the right to refuse to exceed the caps. If a student is enrolled on/prior to the 7th day, and remains on the roll sheet at the start of the 8th day of instruction, compensation will be granted retroactively to the first day that actual enrollment exceeded class size maximums.
   c) After the 20th day of instruction, each additional student necessitates a separate request. A member has the right to refuse all or some requests that exceed the maximum class size of 29. Example after first 20 days: Member may agree to take 30th student, but decline to take 31st student.
   d) Before any teacher takes a 31st student, grade level partners will be offered the opportunity to take a 30th student. Rotation will continue anytime there is a request to add students. Should the need to add students happen in multiple years, the teacher who did not take additional students, or who had the least number of additional students, will be offered additional students first.
   e) After the 20th day, the total number of students shall not exceed 34.
3) Secondary (Including Departmentalized Grades 6-8 at K-8s):
   a) Compensation equates to $7 per student / per class / per day over the maximum direct instructional student contact limit at the secondary level.
   b) Compensation will apply anytime that the district exceeds the class size or contact maximum beginning on the 8th day of instruction. Per Article 7.09, during the first 20 days of instruction (10 days at Block Schools) the District may assign students into the class above the class size maximum. After the first 20 days (10 at Block schools), a member will have the right to refuse to exceed the cap. If a student is enrolled on/prior to the 7th day, and remains on the roll sheet at the start of the 8th day of instruction, compensation will be granted retroactively to the first day that actual enrollment exceeded class size or contact maximums.
   c) Block Schools only - Term 2: Compensation will apply beginning on the 5th instructional day. Per Article 7.09, during the first 10 days of instruction the District may assign students into the class. After the first 10 days a member

will have the right to refuse to exceed the caps. If a student is enrolled on/prior to the 4th day, and remains on the roll sheet at the start of the 5th day of instruction, compensation will be granted retroactively to the first day that actual enrollment exceeded class size or contact maximums.

d) **After the 20th day of instruction, each additional student necessitates a separate request. A member has the right to refuse all or some requests. Example: Member may agree to take 166 students, but decline to take 167 students.**

e) **Before any teacher takes multiple additional students, a reasonable effort will be made to offer the opportunity to take additional students to others. Rotation will continue anytime there is a request to add students. Should the need to add students happen in multiple years, the teacher who did not take additional students, or who had the least number of additional students, will be offered additional students first.**

f) **After the 20th day, no individual class may exceed the maximum class size outlined in Article 7.**

Article 9 - Employee Benefits

9.01.1.b.i **If an employee wishes to enroll in the District sponsored buy up vision plan, which permits coverage for eligible dependents, the employee will be responsible for paying the full cost of this coverage for their dependents, as well as any additional premium for their own buy up plan coverage.**

Jim Shoemake 11/13/19

Jim Shoemake Date
Assistant Superintendent
Schools and Labor Relations
San Juan Unified School District

11/13/19

Dr. Edward F. Burgess IX Date
Associate Executive Director
San Juan Teachers Association

Exhibit S

Regarding Combination Class Best Practices:

It is the intent of the District and the Association to provide support to administrators and practitioners when combination classes are unavoidable by providing site administrators and practitioners with a document that they can mutually review prior to the start of the school year. Consideration to provide all or some of the following supports should be considered prior to selecting the practitioner to teach a combination class.

- **Provide practitioners of combination classes with priority or choice in picking prep period**
- **Reduce number of supervisory duties (to the extent possible)**
- **Provide practitioners of combination classes with high levels of access to various technology needed for instruction. Examples could include:**
    - **COW to be housed in combination classroom**
    - **Additional iPads for classroom use**
    - **Additional resources as available**
- **Provide practitioners of combination classes with clerical support for clerical needs (ex: for copying material or scheduling parent/guardian meetings)**
- **Provide additional supportive incentives as determined at the site level**

After assigning a practitioner to teach a combination class, the site administrator will consult with the practitioner regarding the Best Practices contained in this agreement. To the extent possible / practical, the parties will keep the following recommendations in mind leading up to the establishment of a combination class.

- **Grade level team's input should be provided on site articulation cards**
    - **When possible – provide additional time or pay for teams to participate in the articulation process**
- **Designation of combo class candidates on articulation cards (this can be done regardless of need for combo class)**
- **Make every effort to fill and cap combination classes early in the school year. This strategy should:**
    - **help to ensure classes are as balanced as soon as possible**
    - **help to minimize students transferring in/out**
- **Student transfers into the school generate conversations with grade level partners and combination class practitioners regarding best way to manage impact**

- **To the extent possible avoid assigning temporary or probationary practitioners to combination classes**

As part of our ongoing commitment to improving collaboration, the parties agree to revisit this process during the contract negotiations following the 2022-23 school year.

SIDE LETTER OF AGREEMENT
BETWEEN
SAN JUAN UNIFIED SCHOOL DISTRICT (District)
AND
SAN JUAN TEACHERS ASSOCIATION (Association)
Regarding Practitioner Input to Assignment - Prototype

Background:

During the 2017-18 bargaining sessions, the San Juan Unified School District (District) and the San Juan Teachers Association (Association) expressed an interest in bringing greater levels of collaboration and transparency to the secondary course assignments and elementary grade level assignment processes. As part of that agreement, the parties agreed to establish a joint committee to explore interests and opportunities related to increased practitioner voice in their teaching assignment.

Statement of Intent:
It is in the best interest of the San Juan students that the District and the Association cooperatively engage in activities and communication, which demonstrate mutual respect for all professionals.

Agreement:
The Association and the District mutually agree that site administrators have the right of assignment as cited in section 5551 of Title 5 of the California Code of Regulations.
The Association and the District also mutually agree that when professionals engage cooperatively, collaboratively and transparently, it creates a trusting and cohesive environment, which ultimately results in better outcomes for students.

Therefore, in order to provide greater input from practitioners and increase the level of collaboration and transparency during the process, the District and the Association agree to offer schools and programs an opportunity to develop prototypes for the process of making secondary course assignments or elementary grade level assignments. The prototypes developed by the participating sites will be used at the selected sites for the 2020-21 school-year assignments. Teams selected to participate in the first year, will be invited to provide their feedback to help determine if the prototype will be extended for a second year.

Elementary and K8s, and Programs:
To be eligible, the site Leadership Team (practitioners and administration) will meet to discuss the merits of applying to participate in this prototype. If there is majority interest to participate in the prototype the Leadership Team will notify Jim Shoemake at jshoemake@sanjuan.edu that the site has an interest in participating. If selected for this prototype, each team will co-construct a process that brings a greater level of practitioner voice in their site/program assignments.

Secondary (Middle/High):

To be eligible, the site Department Chairs and administrative team will meet to discuss the merits of applying to participate in this prototype. If there is majority interest to participate in the prototype the site administrator will notify Jim Shoemake via email at jshoemake@sanjuan.edu that the site has an interest in participating. If selected for this prototype, each team will co-construct a process that brings a greater level of practitioner voice in their site assignments.

Elements of Prototype:
In all cases, prototype teams will be expected to address the following when developing their process:

- How do we solicit practitioner input (survey, interest forms, department feedback, timeline, etc.);
- How do we create a draft assignment schedule;
  - How do we handle requested assignments;
  - How do we handle elements of confidentiality and maintain transparency;
- How is communication to staff handled (during input, development, draft, changes, timeline, etc.)?

All sites and programs are welcome to volunteer for the prototype process. The District and Association have agreed to limit the number of teams participating in the Spring of 2020 in order to reflect on what does and does not work. The selection team will be comprised of the SJTA President, SJTA Executive Director, SJTA Associate Executive Director, SJUSD Assistant Superintendent of Secondary, SJUSD Assistant Superintendent of Schools and Labor Relations and the SJUSD Senior Director of Elementary. Decisions by the selection team to allow schools to participate in this prototype must be by mutual agreement. Teams not selected to participate may be encouraged to apply to participate if this prototype continues in 2021.

Participating schools will attend an initial meeting in November to discuss development process and a second meeting in January to review plans. Teams unable to provide an agreed upon process by January 30th will be removed from the prototype.

The District and the Association will meet in the fall of 2020 and 2021 with participating teams to debrief initial learning and to plan for next steps.

Language in this side letter of agreement is not subject to the grievance process. This Agreement will sunset following the 2021-22 school year unless:

A. It is abandoned by mutual agreement
B. It is extended by mutual agreement.

Jim Shoemake 11/13/19
Jim Shoemake Date
Assistant Superintendent
Schools and Labor Relations
San Juan Unified School District

11/13/19
Dr. Edward F. Burgess IX Date
Associate Executive Director
San Juan Teachers' Association

SIDE LETTER OF AGREEMENT
Between
SAN JUAN UNIFIED SCHOOL DISTRICT (District)
AND
SAN JUAN TEACHERS ASSOCIATION (Association)
Agreement Regarding Special Education Prototypes

Background:
In 2018, The San Juan Unified School District and the San Juan Teachers Association bargained language to establish a Special Education Committee to inform the bargaining teams on interests and opportunities related to supporting our Special Education teachers.

Intent:
Effective July 1, 2020, this Side Letter of Agreement proposes to prototype various forms of support for Special Education Teachers and to create a Stakeholder Advisory Team to monitor and support the work of these prototypes.

Agreement

Support of Assessments and Caseload
The District agrees to create and implement two full-time certificated positions. These certificated members will be focused on performing assessments and providing caseload support to members currently at, or near caseload maximums.

Support of IEP Management

1. Mutually identify two high schools, two middle schools, four elementary-schools at which an existing member of the clerical staff would be willing to add hours to their current position (1.0 hour per day at high school, 45 minutes per day at middle school, 30 minutes per day at elementary depending on population). During that time, individuals would work with Special Education teachers on site to assist in providing IEP and clerical support. Examples would include: IEP scheduling, copying of curriculum / materials, etc. **Those selected to participate will receive training. Details of the training will be determined once sites are selected.**
2. Mutually identify two high schools, two middle schools, four elementary schools at which an existing instructional support staff member would be willing to add hours to their current position (1.0 hour per day at high school, 45 minutes per day at middle school, 30 minutes per day at elementary depending on population). During that time, individuals would work with Special Education teachers on site to assist in providing support. Examples would include: IEP scheduling, assisting with curriculum / materials, differentiated instructional services, etc. **Those selected to participate will receive training. Details of the training will be determined once sites are selected.**

Feedback Loop:
The District and the Association agree to create a Stakeholder Advisory Team. This team will meet at least once every two (2) months (outside the school day) starting January 2020 through

the 2020-2021 school year to monitor and assess the progress of the above prototypes. The team shall be comprised of 12 total members: four members of management (including the Director of Special Education), seven members of the bargaining unit, and one SJTA staff member. The committee shall be responsible for providing a report back to the District and Association for consideration on which prototypes (if any) should move forward as pilots. Based on feedback from the Special Education Joint Committee, the Stakeholder Advisory Team will also make a good faith effort to increase the levels of professionalism and respect between the practitioners and managers in the system. The bargaining unit members on the team shall receive a stipend of $1,200 for service on the team.

The aim is to begin developing these prototypes in January of 2020, with the intention of launching prototypes at the start of the 2020-21 school year. These prototype will sunset following the 2020-2021 school year with the intent of establishing a pilot for the 2021-2022 school year unless:

A) It is extended by mutual agreement and/or modification
B) Language intended to supplant this agreement is negotiated into the CBA.

For the San Juan Unified School District

11/13/19

Jim Shoemake Date
Assistant Superintendent
Schools and Labor Relations
San Juan Unified School District

For the San Juan Teacher' Association

11/13/19

Dr. Edward Burgess IX Date
Associate Executive Director
San Juan Teachers' Association

San Juan Unified School District
2020-2021 School Year Calendar - DRAFT

	FIRST WEEK					SECOND WEEK					THIRD WEEK					FOURTH WEEK					FIFTH WEEK					School Days Elem	School Days Sec	Non-Inst Day	Optional Days
	M	T	W	T	F	M	T	W	T	F	M	T	W	T	F	M	T	W	T	F	M	T	W	T	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				
August	~~3~~	~~4~~	~~5~~	~~6~~	~~7~~	~~10~~	11	12	~~13~~	14	17	18	19	20	21	24	25	26	27	28	31					13	13	2	
September		1	2	3	4	**7**	8	9	10	11	14	15	16	17	18	21	22	23	24	25	28	29	30			21	21		
October				1	2	~~5~~	6	7	8	9	12	13	14	15	16	19	20	21	22	23	26	27	28	29	30	21	21		
November	2	3	4	5	6	9	10	**11**	12	**13**	16	17	18	19	20	~~23~~	~~24~~	~~25~~	**26**	**27**	30					14	14	1 (Elem & K8)	1 (MS & HS)
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	14		
January					1	**4**	5	6	7	8	11	12	13	14	15	**18**	19	20	21	22	25	26	27	28	29	18	18	1 (MS & HS)	1 (Elem & K8)
February	1	2	3	4	5	8	9	10	11	12	**15**	**16**	~~17~~	~~18~~	~~19~~	22	23	24	25	26						15	15		
March	1	2	3	4	5	~~8~~	9	10	11	12	15	16	17	18	19	22	23	24	25	26	~~29~~	~~30~~	~~31~~			19	19		
April				~~1~~	**2**	5	6	7	8	9	12	13	14	15	16	19	20	21	22	23	26	27	28	29	~~30~~	19	19		
May	3	4	5	6	7	10	11	12	13	14	17	18	19	20	21	24	25	26	27	28	**31**					20	20		
June		1	2	3	4	7	~~8~~	9	~~10~~	~~11~~	~~14~~	~~15~~	~~16~~	~~17~~	~~18~~	~~21~~	~~22~~	~~23~~	~~24~~	~~25~~	~~28~~	~~29~~	~~30~~			6	6	1	

Holidays

September 7, Labor Day
November 11, Veterans' Day (Observed)
November 26, Thanksgiving Day
November 27, Local Holiday
December 25, Christmas Day
December 28, 29, 30, 31 Winter Recess
January 1, New Year's Day
January 18, Martin Luther King, Jr. Day
February 15, Presidents' Day
February 16, Lincoln's Day Observed
April 2, Local Holiday
May 31, Memorial Day

First/Last Day of Service
August 11 - June 9

Student First/Last Day
August 13 - June 8

***Non-Instructional Days**
August 11 - Staff Development Day
August 12 - Teacher Work Day
November 13 - Elementary & K8 Teacher Work Day
November 13 - MS & HS Teacher non-work day
January 4 - MS & HS Teacher Work Day
January 4 - Elementary & K8 Teacher non-work day
June 9 - Teacher Work Day (186 day or less only)
*Plus 2 Staff Development Days (Legislative-Non ADA): as determined per site

Work Days	180	180	
Non-Instructional Days*			4
Staff Development Days**			2
Total Days			186

Semester Dates - Secondary (MS & HS)
August 13 - January 4 = 83 Days
January 5 - June 8 = 97 Days

Trimester Dates - Elementary & K8
August 13 - November 13 (12 weeks)
November 16 - March 5 (12 weeks)
March 9 - June 8 (12 weeks)

Board Approved:

Strike through days represent "School Recess Days"

SACRAMENTO COUNTY OFFICE OF EDUCATION

PUBLIC DISCLOSURE OF COLLECTIVE BARGAINING AGREEMENT

In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5, and CCR, Title V, Section 15449

Name of School District: San Juan Unified School District - *General Fund*

Name of Bargaining Units: SJTA, SJAA, SJPEC, SJSA, Teamsters, Unrepresented, Confidential, Supervisors, Board Contracted Cabinet members & Teamsters

Certificated, Classified, Other: Certificated & Classified, Board Contracts

The proposed agreements cover the period beginning: July 1, 2019 (date) **and ending:** June 30, 2021 or later (date)

The Governing Board will act upon the proposed agreement(s) on: January 28, 2020 (date)

Note: This form, along with a copy of the proposed agreement, must be submitted to the County Office at least ten (10) working days prior to the date the Governing Board will take action. This form must also be available to the public at least ten (10) working days prior to the date the governing board will take action on the proposed bargaining agreements.

A. Proposed Change in Compensation

Page 1a

	Compensation	Annual Cost Prior to Proposed Agreement	Fiscal Impact of Proposed Agreement Year 1 Increase (Decrease)	Year 2 Increase (Decrease)	Year 3 Increase (Decrease)
		FY 2019-20 1st Interim 12/10/2019 Board Approved	FY 2019-20	FY 2020-21	FY 2021-22
1	**Salary Schedule** (This is to include Step and Column, which is also reported separately in Item 6)	$280,446,352	$0	$0	$0
			0.00%	0.00%	0.00%
2	**Other Compensation** Stipends, Bonuses, Longevity, Overtime, Differential, Callback or Standby Pay, etc.	$0	$4,257,662	($4,257,662)	$0
			1.52%	-1.52%	0.00%
3	**Statutory Benefits -** STRS, PERS, FICA WC, UI, Medicare, etc. (retiree h&w and long-term sick leave included in section 4)	$84,140,899	$899,846	($899,846)	$0
			1.07%	-1.07%	0.00%
4	**Health/Welfare Plans -** includes medical, dental, vision, life insurance, retiree h&w, long-term sick leave, cash option, PEHP	$65,550,890	$113,642	($113,642)	$0
			0.17%	-0.17%	0.00%
5	**Total Compensation -** Add Items 1 through 4 to equal 5	$430,138,141	$5,271,150	($5,271,150)	$0
			1.23%	-1.23%	0.00%
6	**Step and Column -** Due to movement plus any changes due to settlement. 2019-20, 2020-21 and 2021-22 step and column increases have already been included in the multi-year projection. This is a subset of Item No. 1	$2,056,247	$0	$0	$0
7	**Total Number of Represented Employees** (Use FTEs if appropriate)	2,555.44	2,555.44	2,555.44	2,555.44
8	**Total Compensation Average Cost per Employee**	$168,323	2062.717184	($2,063)	$0
			1.23%	-1.23%	0.00%

A. Proposed Change in Compensation-breakdown of amounts on page 1 General fund
Page 1b

	Compensation	Annual Cost Prior to Proposed Agreement FY 2019-20 1st Interim 12/10/2019 Board Approved	Fiscal Impact of Proposed Agreement Year 1 Increase (Decrease) FY 2019-20	Year 2 Increase (Decrease) FY 2020-21	Year 3 Increase (Decrease) FY 2021-22
1	**Salary Schedule** (This is to include Step and Columns, which is also reported separately in Item 6	$280,446,352	$0	$0	$0
	Certificated Salaries - Object 1xxx - SF 0	$164,202,948			
	Certificated Salaries - Object 1xxx - Restricted	$43,956,586			
	Classified Salaries - Object 2xxx - SF 0	$42,671,020			
	Classified Salaries - Object 2xxx - Restricted	$29,615,798			
	Salary Increase Certificated Salaries SJTA Only - Object 1xxx - SF 0				
	Salary Increase Certificated Salaries SJTA Only - Object 1xxx - Restricted				
	Salary Increase Classified Salaries Object 2xxx - SF 0				
	Salary Increase Classified Salaries Object 2xxx - Restricted				
	Salary Increase Certificated Salaries - Object 1xxx - SF 0				
	Salary Increase Certificated Salaries Object 1xxx - Restricted				
	Other - Certificated Salaries - Object 1xxx - SF 0				
	Other - Certificated Salaries - Object 1xxx -Restricted				
	Other - Classified Salaries - Object 2xxx - SF 0				
	Other - Classified Salaries - Object 2xxx -Restricted				$0
2	**Other Compensation** Stipends, Bonuses, Longevity, Overtime, Differential, Callback or Standby Pay, etc	$0	$4,257,662	($4,257,662)	$0
	One Time Payment - 2% Certificated Salaries - Object 1xxx - SF 0		$3,153,409	($3,153,409)	
	One Time Payment - 2% Certificated Salaries - Object 1xxx - Restricted		$797,881	($797,881)	
	One Time Payment - 2%Classified Salaries - Object 2xxx - SF 0		$242,060	($242,060)	
	One Time Payment - 2%Classified Salaries - Object 2xxx - Restricted		$64,312	($64,312)	$0
3	Statutory Benefit - Certificated Rates	20.50%	20.50%	21.80%	21.50%
	Statutory Benefit - Classified Rates	29.32%	29.321%	32.30%	34.20%
	Statutory Benefits - STRS, PERS, FICA, WC, UI, Medicare, etc. (Retiree H&W & Long-term Sick Leave included in section 4	$84,140,899	$899,846	($899,846)	$0
	Payroll costs SF 0	$45,907,491			
	Payroll costs-Restricted	$38,233,408			
	Salary Increase - Certificated payroll costs - SF 0		$0	$0	$0
	Salary Increase - Certificated payroll costs - Restricted		$0	$0	$0
	Salary Increase - Classified payroll costs - SF 0		$0	$0	$0
	Salary Increase - Classified payroll costs - Restricted		$0	$0	$0
	Salary Increase Other - Certificated payroll costs - SF0		$0	$0	$0
	Salary Increase Other - Certificated payroll costs - Restricted		$0	$0	$0
	Other - Certificated payroll costs - SF0		$0	$0	$0
	Other - Certificated payroll costs - Restricted		$0	$0	$0
	Other - Classified payroll costs - SF0		$0	$0	$0
	Other - Classified payroll costs - Restricted		$0	$0	$0
	One Time Payment - Certificated payroll costs - SF0		$646,449	($646,449)	
	One Time Payment - Certificated payroll costs - Restricted		$163,566	($163,566)	
	One Time Payment - Classified payroll costs - SF0		$70,974	($70,974)	
	One Time Payment-Classified payroll costs - Restricted		$18,857	($18,857)	

	Compensation	Annual	Fiscal Impact of Proposed Agreement		
		Cost Prior to Proposed Agreement	Year 1 Increase (Decrease)	Year 2 Increase (Decrease)	Year 3 Increase (Decrease)
		FY 2019-20 1st Interim 12/10/2019 Board Approved	FY 2019-20	FY 2020-21	FY 2021-22
4	**Health/Welfare Plans -** medical,dental,vision, life insurance, retiree h&w, lt sick leave, cash option (obj 340x, 395x,	$65,550,890	$113,642	($113,642)	$0
	Unrestricted (SF 0)				
	Medical/Dental/VSP - Object 340x	$38,389,575			
	Life Insurance - Object 395x	$265,348			
	Retiree H&W & Long-term Sick Leave - * See below for rates	$6,174,618	$90,575	($90,575)	$0
	Cash Option - Object 391x	$332,165			
	Health & Welfare -SF 0 Certificated - * See below for rates				
	Health & Welfare -Restricted Certificated -* See below for rates				
	Health & Welfare -SF 0 Classified - *See below for rates				
	Health & Welfare - Restricted Classified -* See below for rates				
	Post Employment Health Plan (PEHP) Object 3751 (SJTA only)-SF 0				
	Total Unrestricted	**$45,161,706**	**$90,575**	**($90,575)**	**$0**
	Restricted				
	Medical/Dental/VSP - Object 340x	$17,630,565			
	Life Insurance - Object 395x	$116,373			
	Retiree H&W & Long-term Sick Leave - * See below for rates	$2,535,281	$23,067	($23,067)	$0
	Cash Option - Object 391x	$100,609			
	Post Employment Health Plan (PEHP) Object 3751 (SJTA only)-SF 3,5	$6,356			
	Total Restricted	**$20,389,184**	**$23,067**	**($23,067)**	**$0**
5	**Total Compensation -** Add Items 1 through 4	$430,138,141	$5,271,150	($5,271,150)	$0
6	**Step and Column - Related** to movement plus any changes due to settlement. This is a subset of Item No. 1	$2,056,247		$0	$0
	FTE - Using Oct 31, 2019 FTE for cost prior to proposed agreements. Years 1 - 3 have changes only due to the proposed agreements.	2,555.44	2,555.44	2,555.44	2,555.44

* Rates:	FY 2019-20	FY 2019-20	FY 2020-21	FY 2021-22
Retiree H&W & Long-term Leave Rates - Certificated	2.50%	2.50%	2.60%	2.60%
Retiree H&W & Long-term Leave Rates - Classifiec	4.85%	4.85%	4.95%	4.95%
Health & Welfare	4.10%	4.10%	6.50%	7.75%
Step & Column - Certificated	0.70%		0.80%	0.80%
Step & Column - Classifiec	0.85%		0.90%	0.90%

9. What was the negotiated salary percentage increase approved? For example, if the increase in "Year 1" was for less than a full year, what is the annualized percentage of that increase for "Year 1"?

One-time off schedule payment

Article 11 - Salary (SJTA) - The District shall provide a one-time off schedule payment equal to 2.0 % of each member's base salary (Exhibits D1-Df and F1) and stipends included in contract (Exhibit D9) for the full or partial period between 07/01/19 to 06/30/20. The one-time off schedule payment will be paid within 60 days of board ratification. This one-time off schedule payment will not increase base compensation for the 2019-20 fiscal year.

Article 12 - Salary (SJPEC) - The District shall provide a one-time off schedule payment equal to 2.0% of each member's base salary (Appendix E) and stipends included in contract for the full or partial period between 07/01/19 to 06/30/20. The one-time off schedule payment will be paid within 60 days of board ratification. This one-time off schedule payment will not increase base compensation for the 2019-20 fiscal year.

Article 5 - Salary (SJSA) - The District shall provide a one-time off schedule payment equal to 2.0% of each member's base salary (Exhibit B) for the full or partial period between 07/01/19 to 06/30/20. The one-time off schedule payment will be paid within 60 days of board ratification. This one-time off schedule payment will not increase base compensation for the 2019-20 fiscal year.

Article 6 - Salary (Teamsters) - The District shall provide a one-time off schedule payment equal to 2.0% of each member's base salary (Transportation Salary Schedule) and the shift differential (Article 6.1.2) for the full or partial period between 07/01/19 to 06/30/20. The one-time off schedule payment will be paid within 60 days of board ratification. This one-time off schedule payment will not increase base compensation for the 2019-20 fiscal year.

Salary Schedule Adjustments - (Confidential Group, Unrepresented Specialists, SJAA and Cabinet) - The District shall provide a one-time off schedule payment equal to 2.0% of each member's base salary for the full or partial period between 07/01/2019 to 06/30/2020. The one-time off schedule payment will be paid within 60 days of board ratification. This one-time off schedule payment will not increase base compensation for the 2019-2020 fiscal year.

10. Were any additional steps, columns, or range added to the schedules? (If yes, please explain.)

There were no additional steps, columns or range added to the schedules.

11. Please include comments and explanations as necessary. (If more room is necessary, please attach an additional sheet.)

CSEA has not concluded negotiations and are not part of this disclosure. However, for unrestricted general fund, we included the potential cost in the current and subsequent years under "assigned amounts". For restricted general fund and all other funds, the potential costs are included in the current and subsequent years under "assigned/reserved amounts". The assumption is that restricted resources will reduce or increase other expenditures to offset the increased or decreased salaries and benefit costs.

12. Does this bargaining unit have a negotiated cap for Health & Welfare benefits? **Yes** ☐ **No** ☒

If yes, please describe the cap amount.

N/A

B. Proposed Negotiated Changes in other compensation and non-compensation Items (i.e., class size adjustments, staff development days, teacher prep time, classified staffing ratios, etc.).

Article 8.01.18 - Compensation for Over Contact Maximum (SJTA) - Beginning in July 1, 2020, the District and the Association agree that the district may exceed the number of daily contacts as capped by contract, provided the following applies:

1) Elementary TK-3rd:

a) Compensation equates to $25 per student / per day over the maximum class size at the elementary level. (See attached Tentative Agreement for details.)

Item B Continued

2) Elementary 4th-6th (Self-contained classrooms only):

a) Compensation equates to $25 per student / per day over the maximum class size at the elementary level. (See attached Tentative Agreement for details.)

3) Secondary (Including Departmentalized Grades 6-8 at K-8s):

a) Compensation equates to $7 per student / per class / per day over the maximum direct instructional student contact limit at the secondary level. (See attached Tentative Agreement for details.)

Article 9.01.1.b.i (SJTA) - If an employee wishes to enroll in the District sponsored buy up vision plan, which permits coverage for eligible dependents, the employee will be responsible for paying the full cost of this coverage for their dependents, as well as any additional premium for their own buy up plan coverage.

Article 13.3.1 (SJPEC) - If an employee wishes to enroll in the District sponsored buy up vision plan, which permits coverage for eligible dependents, the employee will be responsible for paying the full cost of this coverage for their dependents, as well as any additional premium for their own buy up plan coverage.

Article 6.1.2.2 (SJSA)- If an employee wishes to enroll in the District sponsored buy up vision plan, which permits coverage for eligible dependents, the employee will be responsible for paying the full cost of this coverage for their dependents, as well as any additional premium for their own buy up plan coverage.

Article 7.1.3.a (Teamsters) - If an employee wishes to enroll in the District sponsored buy up vision plan, which permits coverage for eligible dependents, the employee will be responsible for paying the full cost of this coverage for their dependents, as well as any additional premium for their own buy up plan coverage.

Implementation of these articles is deemed to be cost neutral.

C. What are the specific impacts (positive or negative) on instructional and support programs to accommodate the settlement? Include the impact of changes such as staff reductions or increases, program reductions or increases, elimination or expansion of other services or programs (i.e., counselors, librarians, custodial staff. etc.)

Salary increase helps SJUSD with employee recruitment. As much as possible, program budgets will absorb cost increases. Unappropriated fund balance is the source of funding to accommodate the settlements until additional solutions are identified and approved.

D. What contingency language is included in the proposed agreement (e.g., reopeners, etc.)?

CONTINGENCY LANGUAGE:

Article 1 - Term #1.06.3 (SJTA) - The parties agree to reopen negotiations for the 2020-21 school year. The following will be considered reopeners: Article 11 (Salary), Article 8 (Hours) and Article 9 (Employee Benefits). Unless by mutual agreement, no other Articles will be reopened for the 2020-21 school year. The intent in limiting the scope of the reopeners for the 2020-21 negotiations is to focus on the issues that were revealed by the total compensation comparability study in 2019.

Article 1 - Term #1.06.3 (SJPEC) - The parties agree to reopen negotiations for the 2020-21 school year. The following will be considered reopeners: Article 11 (Salary) and Article 9 (Employee Benefits). Unless by mutual agreement, no other Articles will be reopened for the 2020-21 school year.

Article 1 - Term #1.06.3 (SJSA) - The parties agree to reopen negotiations for the 2020-21 school year. The following will be considered reopeners: Article 5 (Salary) and Article 9 (Fringe Benefits). Unless by mutual agreement, no other Articles will be reopened for the 2020-21 school year.

Article 1 - Term #1.06.3 (Teamsters) - The parties agree to reopen negotiations for the 2020-21 school year. The following will be considered reopeners: Article 6 (Salary) and Article 7 (Fringe Benefits). Unless by mutual agreement, no other Articles will be reopened for the 2020-21 school year.

E. Will this agreement create or decrease deficit financing in the current or subsequent year(s)? "Deficit Financing" is defined to exist when a fund's expenditures and other financing uses exceed its revenues and other financing sources in a given year. If yes, explain the amounts and justification for doing so.

General Fund: *Deficit financing in unrestricted (non-supplemental and supplemental) is expected to be created from the agreements in the current year. In FY 2020-21, deficit spending is decreased due to the reversal of one-time expenses. Fund balance is projected to be used until further budget solutions are identified and approved.*

All Other Funds: *Deficit financing will increase in the current year from the agreements. For FY 2020-21, deficit spending decreases due to reversal of one-time expenses. Fund balance is projected to be used until further budget solutions are identified and approved.*

F. Identify other major provisions that do not directly affect the district's costs, such as binding arbitrations, grievance procedures, etc.

None known at this time.

G. Source of Funding for Proposed Agreement

1. Current Year

The source of funding for the proposed agreements are unrestricted and restricted revenues and fund balance.

2. If this is a single year agreement, how will the ongoing cost of the proposed agreement be funded in subsequent years (i.e., what will allow the district to afford this contract)?

See below item G #3.

3. If this is a multiyear agreement, what is the source of funding, including assumptions used, to fund these obligations in subsequent years? (Remember to include compounding effects in meeting obligations.)

This is a multi-year agreement with a single-year, one-time off schedule payment along with an agreement to reopen negotiations for the 2020-21 fiscal year for specific outlined article reopeners. The sources of funding these multi-year agreements are LCFF, program revenues, and the unappropriated fund balance until additional solutions are identified and approved. The district is initiating a budget review process with the commitment to identify and implement sufficient budget solutions over the next six months.

H. IMPACT OF PROPOSED AGREEMENT ON CURRENT YEAR OPERATING BUDGET

Unrestricted SF0 General Fund

Enter Bargaining Unit/Group: SJTA, SJAA, SJPEC, SJSA, Teamsters, Unrepresented, Confidential, Supervisors, Board Contracted Cabinet members & Teamsters

	Column 1	Column 2	Column 3	Column 4
	FY 2019-20 1st Interim 12/10/2019 Board Approved	Certificated & Classified, Board Contracts	Other Revisions, including proposed budget revision	FY 2019-20 Proposed Budget after adjustments
REVENUES				
LCFF Sources (8010-8099)	$ 366,854,355		$ -	$ 366,854,355
Remaining Revenues (8100-8799)	$ 14,522,516		$ -	$ 14,522,516
TOTAL REVENUES	**$ 381,376,871**	**$ -**	**$ -**	**$ 381,376,871**
EXPENDITURES				
Certificated Salaries (1000-1999)	$ 164,202,948	$ 3,153,409	$ -	$ 167,356,357
Classified Salaries (2000-2999)	$ 42,671,020	$ 242,060	$ -	$ 42,913,080
Employee Benefits (3000-3999)	$ 91,069,197	$ 807,998	$ -	$ 91,877,195
Books and Supplies (4000-4999)	$ 7,972,574	$ -	$ -	$ 7,972,574
Services, Other Operating Expenses (5000-5999)	$ 20,783,531		$ -	$ 20,783,531
Capital Outlay (6000-6999)	$ -		$ -	$ -
Other Outgo (7100-7299) (7400-7499)	$ 613,223		$ -	$ 613,223
Direct Support/Indirect Cost (7300-7399)	$ (6,033,941)		$ -	$ (6,033,941)
Other Adjustments			$ -	$ -
TOTAL EXPENDITURES	**$ 321,278,552**	**$ 4,203,467**	**$ -**	**$ 325,482,019**
OPERATING SURPLUS (DEFICIT)	**$ 60,098,319**	**$ (4,203,467)**	**$ -**	**$ 55,894,852**
TRANSFERS IN & OTHER SOURCES (8910-8979)	$ -		$ -	$ -
TRANSFERS OUT & OTHER USES (7610-7699)	$ 241,294	$ -	$ -	$ 241,294
CONTRIBUTIONS (8980-8999)	$ (58,327,460)	$ (924,067)	$ -	$ (59,251,527)
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	**$ 1,529,565**	**$ (5,127,534)**	**$ -**	**$ (3,597,969)**
BEGINNING BALANCE	$ 45,145,935	$ -	$ -	$ 45,145,935
Prior-Year Adjustments/Restatements (9793/9795)		$ -		$ -
CURRENT-YEAR ENDING BALANCE	**$ 46,675,500**	**$ -**	**$ -**	**$ 41,547,966**
COMPONENTS OF ENDING BALANCE:	$ -			
Nonspendable Amounts:	$ 500,000			$ 500,000
Reserved Amounts (9711-9740)	$ -			$ -
Reserved for Economic Uncertainties (9770)	$ 9,900,000	$ 102,551	$ -	$ 10,002,551
Committed Funds (9750-9760)	$ -		$ -	$ -
Assigned Amounts	$ 4,253,813	$ 1,113,107		$ 5,366,920
Unappropriated Amounts (9790)	**$ 32,021,687**			**$ 25,678,495**

H. IMPACT OF PROPOSED AGREEMENT ON CURRENT YEAR OPERATING BUDGET

Restricted SF 3 & 5 General Fund

Enter Bargaining Unit/Group: SJTA, SJAA, SJPEC, SJSA, Teamsters, Unrepresented, Confidential, Supervisors, Board Contracted Cabinet members & Teamsters

	Column 1	Column 2	Column 3	Column 4
	FY 2019-20 1st Interim 12/10/2019 Board Approved	Certificated & Classified, Board Contracts	Other Revisions, including proposed budget revision	FY 2019-20 Proposed Budget after adjustments
REVENUES				
LCFF Sources (8010-8099)	$ -		$ -	$ -
Remaining Revenues (8100-8799)	$ 101,988,177		$ -	$ 101,988,177
TOTAL REVENUES	**$ 101,988,177**	**$ -**	**$ -**	**$ 101,988,177**
EXPENDITURES				
Certificated Salaries (1000-1999)	$ 43,956,586	$ 797,881	$ -	$ 44,754,467
Classified Salaries (2000-2999)	$ 29,615,798	$ 64,312	$ -	$ 29,680,110
Employee Benefits (3000-3999)	$ 58,622,592	$ 205,490	$ -	$ 58,828,082
Books and Supplies (4000-4999)	$ 24,032,691	$ (143,616)	$ -	$ 23,889,075
Services, Other Operating Expenses (5000-5999)	$ 8,561,263		$ -	$ 8,561,263
Capital Outlay (6000-6999)	$ 929,868		$ -	$ 929,868
Other Outgo (7100-7299) (7400-7499)	$ -		$ -	$ -
Direct Support/Indirect Cost (7300-7399)	$ 4,526,332		$ -	$ 4,526,332
Other Adjustments			$ -	$ -
TOTAL EXPENDITURES	**$ 170,245,130**	**$ 924,067**	**$ -**	**$ 171,169,197**
OPERATING SURPLUS (DEFICIT)	**$ (68,256,953)**	**$ (924,067)**	**$ -**	**$ (69,181,020)**
TRANSFERS IN & OTHER SOURCES (8910-8979)	$ -		$ -	$ -
TRANSFERS OUT & OTHER USES (7610-7699)	$ 2,003,681		$ -	$ 2,003,681
CONTRIBUTIONS (8980-8999)	$ 58,327,460	$ 924,067	$ -	$ 59,251,527
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	**$ (11,933,174)**	**$ -**	**$ -**	**$ (11,933,174)**
BEGINNING BALANCE	$ 37,703,144	$ -	$ -	$ 37,703,144
Prior-Year Adjustments/Restatements (9793/9795)	$ -			$ -
CURRENT-YEAR ENDING BALANCE	**$ 25,769,970**			**$ 25,769,970**
COMPONENTS OF ENDING BALANCE:				
Nonspendable Amounts			$ -	$ -
Reserved Amounts (9711-9740)	$ 25,769,970	$ (290,257)	$ -	$ 25,479,713
Reserved for Economic Uncertainties (9770)			$ -	$ -
Committed Funds	$ -		$ -	$ -
Assigned Amounts		$ 290,257	$ -	$ 290,257
Unappropriated Amounts (9790)	**$ -**	**$ -**		**$ -**

H. IMPACT OF PROPOSED AGREEMENT ON CURRENT YEAR OPERATING BUDGET

Combined General Fund

Enter Bargaining Unit/Group: SJTA, SJAA, SJPEC, SJSA, Teamsters, Unrepresented, Confidential, Supervisors, Board Contracted Cabinet members & Teamsters

	Column 1	Column 2	Column 3	Column 4
	FY 2019-20 1st Interim 12/10/2019 Board Approved	Certificated & Classified, Board Contracts	Other Revisions, including proposed budget revision	FY 2019-20 Proposed Budget after adjustments
REVENUES				
LCFF Sources (8010-8099)	$ 366,854,355	$ -	$ -	$ 366,854,355
Remaining Revenues (8100-8799)	$ 116,510,693	$ -	$ -	$ 116,510,693
TOTAL REVENUES	**$ 483,365,048**	**$ -**	**$ -**	**$ 483,365,048**
EXPENDITURES				
Certificated Salaries (1000-1999)	$ 208,159,534	$ 3,951,290	$ -	$ 212,110,824
Classified Salaries (2000-2999)	$ 72,286,818	$ 306,372	$ -	$ 72,593,190
Employee Benefits (3000-3999)	$ 149,691,789	$ 1,013,488	$ -	$ 150,705,277
Books and Supplies (4000-4999)	$ 32,005,265	$ (143,616)	$ -	$ 31,861,649
Services, Other Operating Expenses (5000-5999)	$ 29,344,794	$ -	$ -	$ 29,344,794
Capital Outlay (6000-6999)	$ 929,868	$ -	$ -	$ 929,868
Other Outgo (7100-7299) (7400-7499)	$ 613,223	$ -	$ -	$ 613,223
Direct Support/Indirect Cost (7300-7399)	$ (1,507,609)	$ -	$ -	$ (1,507,609)
Other Adjustments	$ -	$ -	$ -	$ -
TOTAL EXPENDITURES	**$ 491,523,682**	**$ 5,127,534**	**$ -**	$ 496,651,216
OPERATING SURPLUS (DEFICIT)	**$ (8,158,634)**	**$ (5,127,534)**	**$ -**	$ (13,286,168)
TRANSFERS IN & OTHER SOURCES (8910-8979)	$ -	$ -	$ -	$ -
TRANSFERS OUT & OTHER USES (7610-7699)	$ 2,244,975	$ -	$ -	$ 2,244,975
CONTRIBUTIONS (8980-8999)	$ -	$ -	$ -	$ -
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	**$ (10,403,609)**	**$ (5,127,534)**	**$ -**	**$ (15,531,143)**
BEGINNING BALANCE	$ 82,849,079			$ 82,849,079
Prior-Year Adjustments/Restatements (9793/9795)	$ -	$ -	$ -	$ -
CURRENT-YEAR ENDING BALANCE	**$ 72,445,470**	**$ -**	**$ -**	**$ 67,317,936**
COMPONENTS OF ENDING BALANCE:				$ -
Nonspendable Amounts	$ 500,000			$ 500,000
Reserved Amounts (9711-9740)	$ 25,769,970	$ (290,257)	$ -	$ 25,479,713
Reserved for Economic Uncertainties (9770)	$ 9,900,000	$ 102,551	$ -	$ 10,002,551
Committed Funds	$ -	$ -		$ -
Assigned Amounts	$ 4,253,813	$ 1,403,364	$ -	$ 5,657,177
Unappropriated Amounts - Unrestricted (9790)	$ 32,021,687	$ -	$ -	$ 25,678,495
Reserve for Economic Uncertainties Percentage	2.00%	2.00%		2.00%

I. IMPACT OF PROPOSED AGREEMENT ON SUBSEQUENT YEARS

Combined General Fund

Enter Bargaining Unit/Group: SJTA, SJAA, SJPEC, SJSA, Teamsters, Unrepresented, Confidential, Supervisors, Board Contracted Cabinet members & Teamsters

	FY 2019-20	FY 2020-21	FY 2021-22
	FY 2019-20 Proposed Budget after adjustments	Certificated & Classified, Board Contracts	Second Subsequent Year
REVENUES			
LCFF Sources (8010-8099)	$366,854,355	$370,782,524	$381,799,465
Remaining Revenues (8100-8799)	$116,510,693	$105,340,766	$105,552,421
TOTAL REVENUES	**$483,365,048**	**$476,123,290**	**$487,351,886**
EXPENDITURES			
Certificated Salaries (1000-1999)	$212,110,824	$205,029,438	$206,059,679
Classified Salaries (2000-2999)	$72,593,190	$72,260,096	$73,672,468
Employee Benefits (3000-3999)	$150,705,277	$156,818,518	$162,230,954
Books and Supplies (4000-4999)	$31,861,649	$23,480,702	$27,026,600
Services, Other Operating Expenses (5000-5999)	$29,344,794	$28,575,092	$27,391,847
Capital Outlay (6000-6999)	$929,868	$929,868	$929,868
Other Outgo (7100-7299) (7400-7499)	$613,223	$613,223	$613,223
Direct Support/Indirect Cost (7300-7399)	($1,507,609)	($1,507,609)	($1,507,609)
Other Adjustments	$0	$0	$0
TOTAL EXPENDITURES	**$496,651,216**	**$486,199,328**	**$496,417,030**
OPERATING SURPLUS (DEFICIT)	**-$13,286,168**	**-$10,076,038**	**-$9,065,144**
TRANSFERS IN & OTHER SOURCES (8910-8979)	$0	$0	$0
TRANSFERS OUT & OTHER USES (7610-7699)	$2,244,975	$2,244,975	$2,244,975
CONTRIBUTIONS (8980-8999)	$0	$0	$0
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	**($15,531,143)**	**($12,321,013)**	**($11,310,119)**
BEGINNING BALANCE	$82,849,079	$67,317,936	$54,996,923
Prior-Year Adjustments/Restatements (9793/9795)	$0		
CURRENT-YEAR ENDING BALANCE	**$67,317,936**	**$54,996,923**	**$43,686,804**
COMPONENTS OF ENDING BALANCE:			
Nonspendable Amounts	$500,000	$500,000	$500,000
Reserved Amounts (9711-9740)	$25,479,713	$17,593,764	$8,841,852
Reserved for Economic Uncertainties (9770)	$10,002,551	$9,775,000	$9,975,000
Committed Funds	$0	$0	$0
Assigned Amounts	$5,657,177	$5,910,248	$8,116,381
Unappropriated Amounts - Unrestricted (9790)	**$25,678,495**	**$21,217,911**	**$16,253,571**
Reserve for Economic Uncertainties Percentage	**2.00%**	**2.00%**	**2.00%**

J. IMPACT OF PROPOSED AGREEMENT ON UNRESTRICTED RESERVES

1. State Reserve Standard

		2019-20 Projected Year Totals - Budget	2020-21 Multi-Year Projection	2021-22 Multi-Year Projection
a.	Total Expenditures, Transfers Out, and Uses (Including Cost of Proposed Agreement)	$ 498,896,191	$ 488,444,303	$ 498,662,005
b.	State Standard Minimum Reserve Percentage for this District (2%) enter percentage:	2%	2%	2%
c.	State Standard Minimum Reserve Amount for this District (For districts with less than 1,001 ADA, this is the greater of Line a, times Line b, OR $50,000	$ 9,977,924	$ 9,768,886	$ 9,973,240

2. Budgeted Unrestricted Reserve (After Impact of Proposed Agreement)

a.	General Fund Budgeted Unrestricted Designated for Economic Uncertainties (9770)	$ 10,002,551	$ 9,775,000	$ 9,975,000
b.	General Fund Budgeted Unrestricted Unappropriated Amount (9790)	$ 25,678,495	$ 21,217,911	$ 16,253,571
c.	Special Reserve Fund (Fund 17) Budgeted Designated for Economic Uncertainties (9770)	$ -	$ -	$ -
d.	Special Reserve Fund (Fund 17) Budgeted Unappropriate Amount (9790)	$ -	$ -	$ -
g.	Total Available Reserves	$ 35,681,046	$ 30,992,911	$ 26,228,571
h.	Reserve for Economic Uncertainties Percentage	2.00%	2.00%	2.00%

3. Do unrestricted reserves meet the state minimum reserve amount?

2019-20	Yes	☒	No	☐
2020-21	Yes	☒	No	☐
2021-22	Yes	☒	No	☐

4. If no, how do you plan to restore your reserves?

5. If the total amount of the adjustment in Column 2 on Page 4c does not agree with the amount of the Total Compensation Increase in Section A, Line 5, Page 1a (i.e., increase was partially budgeted), explain the variance below:

Total amount of the adjustment in Column 2 on Page 4c is:	*$*	*5,127,534*
Total Compensation Increase in Section A, Line 5, Page 1a is:	*$*	*5,271,150*
Variance	*$*	*(143,616)*
Net increase contribution to Restricted Repair Maintenance Account (RRMA)	*$*	*(143,616)*

6. Please include any additional comments and explanation of Page 5 if necessary:

K. SALARY NOTIFICATION REQUIREMENT

The following section is applicable and should be completed when any Salary/Benefit Negotiations are settled after the district's final budget has been adopted.

COMPARISON OF PROPOSED AGREEMENT TO CHANGE IN DISTRICT LOCAL CONTROL FUNDING

(a) Current-Year Local Control Funding per ADA(line 19 below):	**$**	**9,758**
(b) Prior-Year Base Funding per ADA (line 20 below)	**$**	**9,442**
(c) Amount of Current-Year Increase: (a) minus (b)	**$**	**316**
(d) Percentage Increase in Base LCFF per ADA: (c) divided by (b)		**3.35%**
(e) Total Compensation Percentage Increase from Section A, Line 5, Page 1 for current year (Year 1)		**1.23%**

1	K-3 CSR		6,361,740
2	EIA		4,398,886
3	Other State categorical		24,749,916
4	Transportation		5,230,781
5	Targeted Instructional Improvement Grant (TIIG)		2,350,261
6	**Total LCFF Categoricals**	**$**	**43,091,584**
7	2012-13 Rev Limit funding per ADA	$	5,303.79
8	**Actual or Estimated funded ADA**		37,595.74
9	Current year ADA x 2012-13 Rev Limit funding per ADA (Rows 7 x 8)		199,399,910
10	Prior year gap funding	$	23,669,103
11	Prior year gap funding per ADA		627.37
12	Total of all prior years gap funding adjusted for current year ADA		112,655,259
13	**Adjusted Funding Floor** (Rows 6 + 9 + 12)	***$***	***355,146,753***
14	**LCFF funding target**	**$**	**366,854,354**
15	Funding GAP (Rows 14-13)	$	11,707,601
16	**LCFF Statewide funding GAP %**		**100.00%**
17	**LCFF Growth (Rows 15 x 16)**	***$***	***11,707,601***
18	***LCFF Funding (Rows 13 + 17)***	***$***	***366,854,354***
19	LCFF revenue per ADA (Rows 18 / 8)	$	9,758
20	Prior year funding per ADA	$	9,442
21	**Per ADA change from Prior year (Rows 19 - 20)**	**$**	**316**
22	Growth Increase % (Rows 21 / 20)		3.35%

L. CERTIFICATION NO. 1: CERTIFICATION OF THE DISTRICTS ABILITY TO MEET THE COSTS OF COLLECTIVE BARGAINING AGREEMENT

The disclosure document must be signed by the district Superintendent and Chief Financial Officer at the time of public disclosure.

In accordance with the requirements of Government Code Section 3547.5, the Superintendent and Deputy Superintendent of San Juan Unified School District (District), hereby certify that the District can meet the costs incurred under the Collective bargaining Agreements between the District and SJTA, SJAA, SJPEC, SJSA barganing units, Unrepresented, Confidential, Teamsters, and Board Contracted Cabinet members during the term of the agreement from July 1, 2019 to June 30, 2021 or later.

The budget revisions necessary to meet the costs of the agreement in each year of its term are as follows:

General Fund Budget Adjustment Categories:	19-20 Budget Adjustment Increase (Decrease)	20-21	21-22
Revenues/Other Financing Sources	$0	$0	$0
Expenditures/Other Financing Uses*	$5,127,534	$ (5,127,534)	$ -
Ending Balance Increase (Decrease)	($5,127,534)	$ 5,127,534	$ -
* (includes budget offsets, if any)			

_____ (No budget revisions necessary)

The Other Funds (Adult Ed, Cafeteria, Child Development, Deferred Maintenance/Building Funds, and Self Insurance Fund) will absorb the increased cost of the agreement for their appropriate Full-Time Equivalent (FTE) staff.

Kent Kern, Superintendent of Schools — **Date**

Kent Stephens, Deputy Superintendent — **Date**

General Funds Group Total *Costs*	19-20	Not Cumulative 20-21	Not Cumulative 21-22
Teachers (SJTA)	$ 4,317,692	$ (4,317,692)	
Teamsters	126,204	(126,204)	
Management (SJAA) & Board Contracted Cabinet members	229,059	(229,059)	
Certificated Supervisory (SJPEC)	449,294	(449,294)	
Supervisors	51,636	(51,636)	
Confidential & Unrepresented Specialists Units	97,265	(97,265)	
Total	$ 5,271,150	$ (5,271,150)	$ -
Less offsets	(143,616)	143,616	$ -
Total impact to budget	$ 5,127,534	$ (5,127,534)	$ -

M. CERTIFICATION NO. 2

The disclosure document must be signed by the district Superintendent or designee at the time of public disclosure and by the President or Clerk of the Governing Board at the time of formal board action on the proposed agreement.

The information provided in this document summarizes the financial implications of the proposed agreement(s) and is submitted to the Governing Board for public disclosure of the major provisions of the agreement(s) (as provided in the "Public Disclosure of Proposed Bargaining Agreement") in accordance with the requirements of AB 1200 and Government Code Section 3547.5.

Kent Kern, Superintendent of Schools
(Signature)

Date

Kent Stephens, Deputy Superintendent
Contact Person

(916) 971-7237
Phone

After public disclosure of the major provisions contained in this summary, the Governing Board at its meeting on January 28, 2020 took action to approve the proposed agreements with SJTA, SJAA, SJPEC, SJSA bargaining units, Unrepresented, Confidential, and Board Contract Cabinet members.

1/28/2020

President, Governing Board
(Signature)

Date

SACRAMENTO COUNTY OFFICE OF EDUCATION

PUBLIC DISCLOSURE OF COLLECTIVE BARGAINING AGREEMENT

In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5, and CCR, Title V, Section 15449

Name of School District: *San Juan Unified School District - Adult Education Fund*

Name of Bargaining Units: SJTA, SJAA, SJPEC, SJSA, Teamsters, Unrepresented, Confidential, Supervisors, Board Contracted Cabinet members & Teamsters

Certificated, Classified, Other: Certificated & Classified, Board Contracts

The proposed agreements cover the period beginning: July 1, 2019 (date) **and ending:** June 30, 2021 or later (date)

The Governing Board will act upon the proposed agreement(s) on: January 28, 2020 (date)

Note: This form, along with a copy of the proposed agreement, must be submitted to the County Office at least ten (10) working days prior to the date the Governing Board will take action. This form must also be available to the public at least ten (10) working days prior to the date the governing board will take action on the proposed bargaining agreements.

A. Proposed Change in Compensation

Page 1 (Other Funds Section)

	Compensation	Annual Cost Prior to Proposed Agreement FY 2019-20 1st Interim 12/10/2019 Board Approved	Fiscal Impact of Proposed Agreement Year 1 Increase (Decrease) FY 2019-20	Year 2 Increase (Decrease) FY 2020-21	Year 3 Increase (Decrease) FY 2021-22
1	**Salary Schedule** (This is to include Step and Columns, which is also reported separately in Item 6)	$1,586,631	$0	$0	$0
			0.00%	0.00%	0.00%
2	**Other Compensation** Stipends, Bonuses, Longevity, Overtime, Differential, Callback or Standby Pay, etc.	$0	$15,707	-$15,707	$0
			0.99%	-0.99%	0.00%
3	**Statutory Benefits** - STRS, PERS, FICA WC, UI, Medicare, etc. (retiree h&w and long-term sick leave included in section 4)	$441,061	$3,220	-$3,220	$0
			0.73%	-0.73%	0.00%
4	**Health/Welfare Plans** - includes medical, dental, vision, life insurance, retiree h&w, long-term sick leave, cash option	$241,129	$393	-$393	$0
			0.16%	-0.16%	0.00%
5	**Total Compensation** - Add Items 1 through 4 to equal 5	$2,268,822	$19,320	-$19,320	$0
			0.85%	-0.85%	0.00%
6	**Step and Column - Due to movement plus any changes due to settlement. 2019-20, 2020-21 and 2021-22 step and column increases have already been included in the multi-year projection. This is a subset of Item No. 1**	$11,029	$0	$0	$0
7	**Total Number of Represented Employees** (Use FTEs if appropriate)	14.14	14.14	14.14	14.14
8	**Total Compensation Average Cost per Employee**	$160,454	$1,366	-$1,366	$0
			0.85%	-0.85%	0.00%
9	**Total Salary Compensation**	$1,586,631	$15,707	-$15,707	$0
	Total Salary Compensation %		0.99%	-0.99%	0.00%

A. Proposed Change in Compensation for Adult Education Fund
Page 2 (Other Funds Section)

	Compensation	Annual Cost Prior to Proposed Agreement FY 2019-20 1st Interim 12/10/2019 Board Approved	Fiscal Impact of Proposed Agreement Year 1 Increase (Decrease) FY 2019-20	Year 2 Increase (Decrease) FY 2020-21	Year 3 Increase (Decrease) FY 2021-22
1	**Salary Schedule** (This is to include Step and Columns, which is also reported separately in Item 6)	$1,586,631.00	$0.00	$0.00	$0.00
	Certificated Salaries - Object 1xxx	$1,303,048		$0	$0
	Classified Salaries - Object 2xxx	$283,583		$0	$0
	Salary Increase Certificated Salaries SJTA - Object 1xxx				
	Salary Increase Certificated Salaries - Object 1xxx				$0
	Salary Increase Classified Salaries Object 2xxx				
	Other - Certificated Salaries - Object 1xxx			$0	
2	**Other Compensation** Stipends, Bonuses, Longevity, Overtime, Differential, Callback or Standby Pay, etc.	$0	$15,707	-$15,707	$0
	One Time Payment -Certificated Salaries - Object 1xxx		$15,707	($15,707)	$0
	One Time Payment - Classified Salaries - Object 2xxx -		$0		$0
3	Statutory Benefit - Certificated Rates	20.50%	20.50%	21.80%	21.50%
	Statutory Benefit - Classified Rates	29.32%	29.32%	32.30%	34.20%
	Statutory Benefits - STRS, PERS, FICA, WC, UI, Medicare, etc. (Retiree H&W & Long-term Sick Leave included in section 4)	$441,061	$3,220	-$3,220	$0
	Certificated Payroll costs	$312,518	$0	$0	$0
	Classified Payroll costs	$128,543	$0	$0	
	Salary Increase - Certificated payroll costs		$0	$0	
	Salary Increase - Classified payroll costs		$0	$0	
	One Time Payment - Certificated payroll costs		$3,220	($3,220)	$0
	One Time Payment - Classified payroll costs				$0
4	**Health/Welfare Plans** - Medical,dental,vision, life insurance, retiree h&w, lt sick leave, cash	$241,129	$393	-$393	$0
	Medical/Dental/VSP - Object 340x	$193,065			
	Life Insurance - Object 395x	$1,734	$0	$0	
	Retiree H&W & Long-term Sick Leave - * See below for rates	$46,330	$393	-$393	$0
	Post Employment Health Plan (PEHP) Object 3751 (SJTA only)				
5	**Total Compensation** - Add Items 1 through 4 to equal 5	$2,268,822	$19,320	-$19,320	$0
6	**Step and Column - Related to movement plus any changes due to settlement. This is a subset of Item No. 1**	$11,029	$0	$0	$0
	FTE - Using Oct 31, 2019 FTE for cost prior to proposed agreements. Years 1 - 3 have changes only due to the proposed	14.14	14.14	14.14	14.14

* Rates:	FY 2019-20	FY 2019-20	FY 2020-21	FY 2021-22
Retiree H&W & Long-term Leave Rates - Certificated	2.50%	2.50%	2.60%	2.60%
Retiree H&W & Long-term Leave Rates - Classified	4.85%	4.85%	4.95%	4.95%
Health & Welfare	4.10%	4.10%	6.50%	7.75%
Step & Column - Certificated	0.70%		0.80%	0.80%
Step & Column - Classified	0.70%		0.90%	0.90%

H. IMPACT OF PROPOSED AGREEMENT ON CURRENT YEAR OPERATING BUDGET
Page 3 (Other Funds Section)

Adult Ed Fund-Unrestricted & Restricted

Enter Bargaining Unit/Group: SJTA, SJAA, SJPEC, SJSA, Teamsters, Unrepresented, Confidential, Supervisors, Board Contracted Cabinet members & Teamsters

	Column 1	Column 2	Column 3	Column 4
	FY 2019-20 1st Interim 12/10/2019 Board Approved	Certificated & Classified, Board Contracts	Other Revisions, including proposed budget revision	FY 2019-20 Proposed Budget after adjustments
REVENUES				
LCFF Sources (8010-8099)	$ -		$ -	$ -
Remaining Revenues (8100-8799)	$ 3,589,476		$ -	$ 3,589,476
TOTAL REVENUES	**$ 3,589,476**	**$ -**	**$ -**	**$ 3,589,476**
EXPENDITURES				
Certificated Salaries (1000-1999)	$ 1,303,048	$ 15,707	$ -	$ 1,318,755
Classified Salaries (2000-2999)	$ 283,583	$ -	$ -	$ 283,583
Employee Benefits (3000-3999)	$ 682,190	$ 3,613	$ -	$ 685,803
Books and Supplies (4000-4999)	$ 191,414		$ -	$ 191,414
Services, Other Operating Expenses (5000-5999)	$ 976,872		$ -	$ 976,872
Capital Outlay (6000-6999)	$ -		$ -	$ -
Other Outgo (7100-7299) (7400-7499)	$ -		$ -	$ -
Direct Support/Indirect Cost (7300-7399)	$ 59,023		$ -	$ 59,023
Other Adjustments	$ -		$ -	$ -
TOTAL EXPENDITURES	**$ 3,496,130**	**$ 19,320**	**$ -**	**$ 3,515,450**
OPERATING SURPLUS (DEFICIT)	**$ 93,346**	**$ (19,320)**	**$ -**	**$ 74,026**
TRANSFERS IN & OTHER SOURCES (8910-8979)	$ 561,360		$ -	$ 561,360
TRANSFERS OUT & OTHER USES (7610-7699)	$ 650,085		$ -	$ 650,085
CONTRIBUTIONS (8980-8999)	$ -		$ -	$ -
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	**$ 4,621**	**$ (19,320)**	**$ -**	**$ (14,699)**
BEGINNING BALANCE	$ 1,482,579			$ 1,482,579
Prior-Year Adjustments/Restatements (9793/9795)	$ -			$ -
CURRENT-YEAR ENDING BALANCE	**$ 1,487,200**	**$ (19,320)**		**$ 1,467,880**
COMPONENTS OF ENDING BALANCE:	$ -			
Nonspendable	$ -			
Restricted	$ 1,461,268	$ (25,497)		$ 1,435,771
Reserved for Economic Uncertainties (9770)	$ -			
Committed	$ -			
Assigned	$ 25,932	$ 6,177		$ 32,109
Unappropriated Amounts (9790)	**$ 0**	**$ -**	**$ -**	**$ 0**

I. IMPACT OF PROPOSED AGREEMENT ON SUBSEQUENT YEARS
Page 4 (Other Funds Section)

Adult Education Fund
Enter Bargaining Unit/Group: ***SJTA, SJAA, SJPEC, SJSA, Teamsters, Unrepresented, Confidential, Supervisors, Board Contracted Cabinet members***

	FY 2019-20	FY 2020-21	FY 2021-22
	FY 2019-20 Proposed Budget after adjustments	Certificated & Classified, Board Contracts	Second Subsequent Year
REVENUES			
LCFF Sources (8010-8099)	$0	$0	$0
Remaining Revenues (8100-8799)	$3,589,476	$3,589,476	$3,589,476
TOTAL REVENUES	$3,589,476	$3,589,476	$3,589,476
EXPENDITURES			
Certificated Salaries (1000-1999)	$1,318,755	$1,313,008	$1,323,468
Classified Salaries (2000-2999)	$283,583	$286,136	$288,711
Employee Benefits (3000-3999)	$685,803	$726,815	$747,212
Books and Supplies (4000-4999)	$191,414	$125,020	$116,474
Services, Other Operating Expenses (5000-5999)	$976,872	$945,860	$923,113
Capital Outlay (6000-6999)	$0		
Other Outgo (7100-7299) (7400-7499)	$0		
Direct Support/Indirect Cost (7300-7399)	$59,023	$103,428	$103,428
Other Adjustments	$0		
TOTAL EXPENDITURES	$3,515,450	$3,500,267	$3,502,406
OPERATING SURPLUS (DEFICIT)	$74,026	$89,209	$87,070
TRANSFERS IN & OTHER SOURCES (8910-8979)	$561,360		
TRANSFERS OUT & OTHER USES (7610-7699)	$650,085	$ 88,725	$88,725
CONTRIBUTIONS (8980-8999)	$0	$0	$0
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	($14,699)	$484	($1,655)
BEGINNING BALANCE	$1,482,579	$1,467,880	$1,468,364
CURRENT-YEAR ENDING BALANCE	$1,467,880	$1,468,364	$1,466,708
COMPONENTS OF ENDING BALANCE:			
Nonspendable	$0		
Restricted	$1,435,771	$1,468,364	$1,466,708
Reserved for Economic Uncertainties	$0		
Committed	$0		
Assigned	$32,109	$0	$0
Reserve for Economic Uncertainties Percentage	0.00%	0.00%	0.00%
	$0	***$0***	***$0***

SACRAMENTO COUNTY OFFICE OF EDUCATION

PUBLIC DISCLOSURE OF COLLECTIVE BARGAINING AGREEMENT

In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5, and CCR, Title V, Section 15449

Name of School District: *San Juan Unified School District - Child Development Fund*

Name of Bargaining Units: SJTA, SJAA, SJPEC, SJSA, Teamsters, Unrepresented, Confidential, Supervisors, Board Contracted Cabinet members & Teamsters

Certificated, Classified, Other: Certificated & Classified, Board Contracts

The proposed agreements cover the period beginning: July 1, 2019 (date) **and ending:** June 30, 2021 or later (date)

The Governing Board will act upon the proposed agreement(s) on: January 28, 2020 (date)

Note: This form, along with a copy of the proposed agreement, must be submitted to the County Office at least ten (10) working days prior to the date the Governing Board will take action. This form must also be available to the public at least ten (10) working days prior to the date the governing board will take action on the proposed bargaining agreements.

A. Proposed Change in Compensation
Page 4 (Other Funds Section)

	Compensation	Annual Cost Prior to Proposed Agreement FY 2019-20 1st Interim 12/10/2019 Board Approved	Fiscal Impact of Proposed Agreement Year 1 Increase (Decrease) FY 2019-20	Year 2 Increase (Decrease) FY 2020-21	Year 3 Increase (Decrease) FY 2021-22
1	**Salary Schedule** (This is to include Step and Columns, which is also reported separately in Item 6)	$12,955,234	$0	$0	$0
			0.00%	0.00%	0.00%
2	**Other Compensation** Stipends, Bonuses, Longevity, Overtime, Differential, Callback or Standby Pay, etc.	$0	$158,037	-$158,037	$0
			1.22%	-1.22%	0.00%
	Description of other compensation				
3	**Statutory Benefits -** STRS, PERS, FICA WC, UI, Medicare, etc. (retiree h&w and long-term sick leave included in section 4)	$4,178,212	$32,398	-$32,398	$0
			0.78%	-0.78%	0.00%
4	**Health/Welfare Plans -** includes medical, dental, vision, life insurance, retiree h&w, long-term sick leave, cash option	$4,152,916	$3,951	-$3,951	$0
			0.10%	-0.10%	0.00%
5	**Total Compensation -** Add Items 1 through 4 to equal 5	$21,286,361	$194,386	-$194,386	$0
			0.91%	-0.91%	0.00%
6	**Step and Column - Due to movement plus any changes due to settlement. 2019-20, 2020-21 and 2021-22 step and column increases have already been included in the multi-year projection. This is a subset of Item No. 1**	$96,947	$0	$0	$0
7	**Total Number of Represented Employees** (Use FTEs if appropriate)	148.20	148.20	148.20	148.20
8	**Total Compensation Average Cost per Employee**	$143,633	$1,312	-$1,312	$0
			0.91%	-0.91%	0.00%
9	**Total Salary Compensation**	$12,955,234	$158,037	-$158,037	$0
	Total Salary Compensation %		1.22%	-1.22%	0.00%

A. Proposed Change in Compensation for Child Development Fund
Page 5 (Other Funds Section)

	Compensation	Annual Cost Prior to Proposed Agreement	Fiscal Impact of Proposed Agreement Year 1 Increase (Decrease)	Year 2 Increase (Decrease)	Year 3 Increase (Decrease)
		FY 2019-20 1st Interim 12/10/2019 Board Approved	FY 2019-20	FY 2020-21	FY 2021-22
1	**Salary Schedule** (This is to include Step and Columns, which is also reported separately in Item 6)	$12,955,234	$0	$0	$0
	Certificated Salaries - Object 1xxx	$8,289,755			
	Classified Salaries - Object 2xxx	$4,665,479			
	Salary Increase Certificated SalariesSJTA Only 1.8% Object 1xxx				
	Salary Increase Certificated Salaries 1.6% - Object 1xxx				
	Other - Certificated Salaries - Object 1xxx				
	Salary Increase Classified - Object 2xxx				
	Other - Classified Salaries - Object 2xxx				
2	**Other Compensation**	$0	$158,037	-$158,037	$0
	One Time Payment -Certificated Salaries - Object 1xxx		$158,037	-$158,037	
	One Time Payment- Classified Salaries - Object 2xxx				
3	Statutory Benefit - Certificated Rates	20.50%	20.50%	21.80%	21.50%
	Statutory Benefit - Classified Rates	29.32%	29.32%	32.30%	34.20%
	Statutory Benefits - STRS, PERS, FICA,WC, UI, Medicare, etc. (Retiree H&W & Long-term Sick Leave included in section 4)	$4,178,212	$32,398	-$32,398	$0
	Certificated payroll costs	$2,902,896			
	Classified payroll costs	$1,275,316			
	Salary Increase 1.8% - Certificated payroll costs		$0	$0	
	Salary Increase 1.6% - Other Certificated payroll costs		$0	$0	
	Other - Certificated payroll costs		$0	$0	
	Salary Increase Classified payroll costs				
	Other - Classified payroll costs			$0	
	One Time Payment - 2% payroll costs(No PERS)		$32,398	-$32,398	
	One Time Payment - Classified payroll costs		$0	$0	

A. Proposed Change in Compensation for Child Development Fund
Page 6 (b) (Other Funds Section)

4	**Health/Welfare Plans** - medical,dental,vision, life insurance, retiree h&w, lt sick leave, cash option (obj 340x, 395x, 37xx, 396x, 391x)	$4,152,916	$3,951	-$3,951	$0
	Medical/Dental/VSP - Object 340x	$3,677,120			
	Life Insurance - Object 395x	$10,300	$0	$0	
	*Retiree H&W & Long-term Sick Leave - * See below for rates*	$463,266	$3,951	($3,951)	
	Post Employment Health Plan (PEHP) Object 3751 (SJTA only)	$2,230	$0	$0	
5	**Total Compensation** - Add Items 1 through 4 to equal 5	$21,286,361	$194,386	-$194,386	$0
6	**Step and Column - Related to movement plus any changes due to settlement. This is a subset of Item No. 1**	$96,947	$0	$0	$0
	FTE - Using Oct 31, 2019 FTE for cost prior to proposed agreements. Years 1 - 3 have changes only due to the proposed agreements.	148.20	148.20	148.20	148.20

* Rates:	FY 2019-20	FY 2019-20	FY 2020-21	FY 2021-22
Retiree H&W & Long-term Leave Rates - Certificated	2.50%	2.50%	2.60%	2.60%
Retiree H&W & Long-term Leave Rates - Classified	4.85%	4.85%	4.95%	4.95%
Health & Welfare	4.10%	4.10%	6.50%	7.75%
Step & Column - Certificated	0.70%	0.00%	0.80%	0.80%
Step & Column - Classified	0.85%	0.00%	0.90%	0.90%

H. IMPACT OF PROPOSED AGREEMENT ON CURRENT YEAR OPERATING BUDGET
Page 3 (Other Funds Section)

Child Development Fund-Unrestricted & Restricted

Enter Bargaining Unit/Group: SJTA, SJAA, SJPEC, SJSA, Teamsters, Unrepresented, Confidential, Supervisors, Board Contracted Cabinet members & Teamsters

	Column 1	Column 2	Column 3	Column 4
	FY 2019-20 1st Interim 12/10/2019 Board Approved	Certificated & Classified, Board Contracts	Other Revisions, including proposed budget revision	FY 2019-20 Proposed Budget after adjustments
REVENUES				
LCFF Sources (8010-8099)	$ -		$ -	$ -
Remaining Revenues (8100-8799)	$ 24,678,198		$ -	$ 24,678,198
TOTAL REVENUES	**$ 24,678,198**	**$ -**	**$ -**	**$ 24,678,198**
EXPENDITURES				
Certificated Salaries (1000-1999)	$ 8,289,755	$ 158,037	$ -	$ 8,447,792
Classified Salaries (2000-2999)	$ 4,665,479	$ -	$ -	$ 4,665,479
Employee Benefits (3000-3999)	$ 8,331,127	$ 36,349	$ -	$ 8,367,476
Books and Supplies (4000-4999)	$ 2,147,319	$ -	$ -	$ 2,147,319
Services, Other Operating Expenses (5000-5999)	$ 420,468		$ -	$ 420,468
Capital Outlay (6000-6999)	$ -		$ -	$ -
Other Outgo (7100-7299) (7400-7499)	$ -		$ -	$ -
Direct Support/Indirect Cost (7300-7399)	$ 831,908		$ -	$ 831,908
Other Adjustments	$ -		$ -	$ -
TOTAL EXPENDITURES	**$ 24,686,056**	**$ 194,386**	**$ -**	**$ 24,880,442**
OPERATING SURPLUS (DEFICIT)	**$ (7,858)**	**$ (194,386)**	**$ -**	**$ (202,244)**
TRANSFERS IN & OTHER SOURCES (8910-8979)	$ -	$ -	$ -	$ -
TRANSFERS OUT & OTHER USES (7610-7699)	$ -		$ -	$ -
CONTRIBUTIONS (8980-8999)	$ -		$ -	$ -
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	**$ (7,858)**	**$ (194,386)**	**$ -**	**$ (202,244)**
BEGINNING BALANCE	$ 2,346,865			$ 2,346,865
Prior-Year Adjustments/Restatements (9793/9795)	$ -			$ -
CURRENT-YEAR ENDING BALANCE	**$ 2,339,007**	**$ (194,386)**	**$ -**	**$ 2,144,621**
COMPONENTS OF ENDING BALANCE:	$ -			
Nonspendable	$ -		$ -	$ -
Restricted	$ 991,037		$ -	$ 991,037
Reserved for Economic Uncertainties (9770)	$ 1,347,970	$ (302,496)		$ 1,045,474
Committed	$ -	$ -	$ -	$ -
Assigned	$ -	$ 108,110	$ -	$ 108,110
Unappropriated Amounts (9790)	**$ -**	**$ 0**	**$ (0)**	**$ (0)**

I. IMPACT OF PROPOSED AGREEMENT ON SUBSEQUENT YEARS
Page 4 (Other Funds Section)

Child Development Fund

SJTA, SJAA, SJPEC, SJSA, Teamsters, Unrepresented, Confidential, Supervisors, Board Contracted Cabinet members &

Enter Bargaining Unit/Group: ***Teamsters***

	FY 2019-20	FY 2020-21	FY 2021-22
	FY 2019-20 Proposed Budget after adjustments	Certificated & Classified, Board Contracts	Second Subsequent Year
REVENUES			
LCFF Sources (8010-8099)	$ -	$ -	$ -
Remaining Revenues (8100-8799)	$ 24,678,198	$ 25,409,439	$ 25,738,979
TOTAL REVENUES	**$ 24,678,198**	**$ 25,409,439**	**$ 25,738,979**
EXPENDITURES			
Certificated Salaries (1000-1999)	$ 8,447,792	$ 8,356,073	$ 8,422,923
Classified Salaries (2000-2999)	$ 4,665,479	$ 4,707,468	$ 4,749,836
Employee Benefits (3000-3999)	$ 8,367,476	$ 8,907,635	$ 9,311,769
Books and Supplies (4000-4999)	$ 2,147,319	$ 2,289,887	$ 2,231,298
Services, Other Operating Expenses (5000-5999)	$ 420,468	$ 420,468	$ 420,468
Capital Outlay (6000-6999)	$ -	$ -	$ -
Other Outgo (7100-7299) (7400-7499)	$ -	$ -	$ -
Direct Support/Indirect Cost (7300-7399)	$ 831,908	$ 881,212	$ 894,212
Other Adjustments	$ -	$ -	$ -
TOTAL EXPENDITURES	**$ 24,880,442**	**$ 25,562,743**	**$ 26,030,506**
OPERATING SURPLUS (DEFICIT)	**$ (202,244)**	**$ (153,304)**	**$ (291,527)**
TRANSFERS IN & OTHER SOURCES (8910-8979)	$ -	$ -	$ -
TRANSFERS OUT & OTHER USES (7610-7699)	$ -	$ -	$ -
CONTRIBUTIONS (8980-8999)	$ -	$ -	$ -
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	**$ (202,244)**	**$ (153,304)**	**$ (291,527)**
BEGINNING BALANCE	$ 2,346,865	$ 2,144,621	$ 1,991,317
CURRENT-YEAR ENDING BALANCE	**$ 2,144,621**	**$ 1,991,317**	**$ 1,699,790**
COMPONENTS OF ENDING BALANCE:			
Nonspendable	$ -	$ -	$ -
Restricted	$ 991,037	$ 811,762	$ 811,762
Reserved for Economic Uncertainties	$ 1,045,474	$ 1,179,555	$ 888,028
Committed	$ -	$ -	$ -
Assigned	$ 108,110	$ -	$ -
Unappropriated Amounts - Unrestricted (9790)	**$ (0)**	**$ -**	**$ -**
Reserve for Economic Uncertainties Percentage	3.77%	4.61%	3.41%

SACRAMENTO COUNTY OFFICE OF EDUCATION

PUBLIC DISCLOSURE OF COLLECTIVE BARGAINING AGREEMENT

In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5, and CCR, Title V, Section 15449

Name of School District: *San Juan Unified School District - Cafeteria Fund*

Name of Bargaining Units: SJTA, SJAA, SJPEC, SJSA, Teamsters, Unrepresented, Confidential, Supervisors, Board Contracted Cabinet members & Teamsters

Certificated, Classified, Other: Certificated & Classified, Board Contracts

The proposed agreements cover the period beginning: July 1, 2019 (date) **and ending:** June 30, 2021 or later (date)

The Governing Board will act upon the proposed agreement(s) on: January 28, 2020 (date)

Note: This form, along with a copy of the proposed agreement, must be submitted to the County Office at least ten (10) working days prior to the date the Governing Board will take action. This form must also be available to the public at least ten (10) working days prior to the date the governing board will take action on the proposed bargaining agreements.

A. Proposed Change in Compensation

Page 5 (Other Funds Section)

	Compensation	Annual Cost Prior to Proposed Agreement	Fiscal Impact of Proposed Agreement Year 1 Increase (Decrease)	Year 2 Increase (Decrease)	Year 3 Increase (Decrease)
		FY 2019-20 1st Interim 12/10/2019 Board Approved	FY 2019-20	FY 2020-21	FY 2021-22
1	**Salary Schedule** (This is to include Step and Columns, which is also reported separately in Item 6)	$5,165,055	$0	$0	$0
			0.00%	0.00%	0.00%
2	**Other Compensation** Stipends, Bonuses, Longevity, Overtime, Differential, Callback or Standby Pay, etc.	$0	$18,014	-$18,014	$0
			0.35%	-0.35%	0.00%
	Description of other compensation				
3	**Statutory Benefits -** STRS, PERS, FICA WC, UI, Medicare, etc. (retiree h&w and long-term sick leave included in section 4)	$1,514,446	$5,281	-$5,281	$0
			0.35%	-0.35%	0.00%
4	**Health/Welfare Plans -** includes medical, dental, vision, life insurance, retiree h&w, long-term sick leave, cash option	$1,691,614	$874	-$874	$0
			0.05%	-0.05%	0.00%
5	**Total Compensation -** Add Items 1 through 4 to equal 5	$8,371,115	$24,169	-$24,169	$0
			0.29%	-0.29%	0.00%
6	**Step and Column - Due to movement plus any changes due to settlement. 2019-20, 2020-21 and 2021-22 step and column increases have already been included in the multi-year projection. This is a subset of Item No. 1**	$43,533	$0	$0	$0
7	**Total Number of Represented Employees** (Use FTEs if appropriate)	16.88	16.88	16.88	16.88
8	**Total Compensation Average Cost per Employee**	$495,919	$1,432	-$1,432	$0
			0.29%	-0.29%	0.00%
9	**Total Salary Compensation**	$5,165,055	$18,014	-$18,014	$0
	Total Salary Compensation %		0.35%	-0.35%	0.00%

A. Proposed Change in Compensation for Cafeteria Fund
Page 6 (Other Funds Section)

	Compensation	Annual Cost Prior to Proposed Agreement	Fiscal Impact of Proposed Agreement Year 1 Increase (Decrease)	Year 2 Increase (Decrease)	Year 3 Increase (Decrease)
		FY 2019-20 1st Interim 12/10/2019 Board Approved	FY 2019-20	FY 2020-21	FY 2021-22
1	**Salary Schedule** (This is to include Step and Columns, which is also reported separately in Item 6)	$5,165,055	$0	$0	$0
	Classified Salaries - Object 2xxx	$5,165,055			
	Salary Increase **Certificated** Salaries - Object 2xxx				
	Salary Increase Classified - Object 2xxx				
	Other - Classified Salaries - Object 2xxx -				
2	**Other Compensation** Stipends, Bonuses, Longevity, Overtime, Differential, Callback or Standby Pay, etc	$0	$18,014	($18,014)	$0
	One Time Payment 2% - Other Classified Salaries - Object 2xxx		$18,014	-$18,014	
3	Statutory Benefit - Certificated Rates				
	Statutory Benefit - Classified Rates	29.32%	29.32%	32.30%	34.20%
	Statutory Benefits - STRS, PERS, FICA, WC, UI, Medicare, etc. (Retiree H&W & Long-term Sick Leave included in section 4)	$1,514,446	$5,281	-$5,281	$0
	Classified payroll costs	$1,514,446			
	Salary Increase - Certificated payroll costs				
	Salary Increase - Classified payroll costs		$0	$0	
	One Time Payment - Certificated payroll costs				
	One Time Payment - other Classified payroll costs		$5,281	($5,281)	
4	**Health/Welfare Plans** - medical, dental, vision, life insurance, retiree h&w, lt sick leave, cash option (obj 340x, 395x, 37xx, 396x, 391x)	$1,691,614	$874	-$874	$0
	Medical/Dental/VSP - Object 340x	$1,654,342			
	Life Insurance - Object 395x	$8,268			
	Retiree H&W & Long-term Sick Leave - * See below for rates	$250,505	$874	-$874	
	Cash Option - Object 391x				
5	**Total Compensation** - Add Items 1 through 4 to equal 5	$8,371,115	$24,169	-$24,169	$0
6	**Step and Column - Related to movement plus any changes due to settlement. This is a subset of Item No. 1**	$43,533	$0	$0	$0
	FTE - Using Oct 31, 2019 FTE for cost prior to proposed agreements. Years 1 - 3 have changes only due to the proposed agreements.	16.88	16.88	16.88	16.88

* Rates:	FY 2019-20	FY 2019-20	FY 2020-21	FY 2021-22
Retiree H&W & Long-term Leave Rates - Classified	4.85%	4.85%	4.95%	4.95%
Health & Welfare	4.10%	4.10%	6.50%	7.75%
Step & Column - Certificated				
Step & Column - Classified	0.85%	0.85%	0.90%	0.90%

H. IMPACT OF PROPOSED AGREEMENT ON CURRENT YEAR OPERATING BUDGET

Page 7 (Other Funds Section)

Cafeteria Fund - Untrestricted & Restricted

Enter Bargaining Unit/Group: ***SJTA, SJAA, SJPEC, SJSA, Teamsters, Unrepresented, Confidential, Supervisors, Board Contracted Cabinet members & Teamsters***

	Column 1	Column 2	Column 3	Column 4
	FY 2019-20 1st Interim 12/10/2019 Board Approved	Certificated & Classified, Board Contracts	Other Revisions, including proposed budget revision	FY 2019-20 Proposed Budget after adjustments
REVENUES				
LCFF Sources (8010-8099)	$ -		$ -	$ -
Remaining Revenues (8100-8799)	$ 17,148,035		$ -	$ 17,148,035
TOTAL REVENUES	**$ 17,148,035**	**$ -**	**$ -**	**$ 17,148,035**
EXPENDITURES				
Certificated Salaries (1000-1999)	$ -		$ -	$ -
Classified Salaries (2000-2999)	$ 5,165,055	$ 18,014	$ -	$ 5,183,069
Employee Benefits (3000-3999)	$ 3,206,060	$ 6,155	$ -	$ 3,212,215
Books and Supplies (4000-4999)	$ 7,097,536		$ -	$ 7,097,536
Services, Other Operating Expenses (5000-5999)	$ 845,348		$ -	$ 845,348
Capital Outlay (6000-6999)	$ 185,000		$ -	$ 185,000
Other Outgo (7100-7299) (7400-7499)	$ -		$ -	$ -
Direct Support/Indirect Cost (7300-7399)	$ 606,881		$ -	$ 606,881
Other Adjustments	$ -		$ -	$ -
TOTAL EXPENDITURES	**$ 17,105,880**	**$ 24,169**	**$ -**	**$ 17,130,049**
OPERATING SURPLUS (DEFICIT)	**$ 42,155**	**$ (24,169)**	**$ -**	**$ 17,986**
TRANSFERS IN & OTHER SOURCES (8910-8979)	$ 175,000		$ -	$ 175,000
TRANSFERS OUT & OTHER USES (7610-7699)	$ 14,433		$ -	$ 14,433
CONTRIBUTIONS (8980-8999)			$ -	$ -
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	**$ 202,722**	**$ (24,169)**	**$ -**	**$ 178,553**
BEGINNING BALANCE	$ 3,205,130			$ 3,205,130
Prior-Year Adjustments/Restatements (9793/9795)	$ -			$ -
CURRENT-YEAR ENDING BALANCE	**$ 3,407,852**	**$ (24,169)**		**$ 3,383,683**
COMPONENTS OF ENDING BALANCE:	$ -			
Nonspendable	$ 193,050			$ 193,050
Restricted	$ 3,214,802	$ (125,638)	$ -	$ 3,089,164
Reserved for Economic Uncertainties (9770)	$ -		$ -	$ -
Committed	$ -		$ -	$ -
Assigned	$ -	$ 101,469	$ -	$ 101,469
Unappropriated Amounts (9790)	**$ -**	**$ -**	**$ -**	**$ -**

I. IMPACT OF PROPOSED AGREEMENT ON SUBSEQUENT YEARS
Page 12 (Other Funds Section)

Cafeteria Fund

Enter Bargaining Unit/Group: *SJTA, SJAA, SJPEC, SJSA, Teamsters, Unrepresented, Confidential, Supervisors, Board Contracted Cabinet members & Teamsters*

	FY 2019-20	FY 2020-21	FY 2021-22
	FY 2019-20 Proposed Budget after adjustments	Certificated & Classified, Board Contracts	Second Subsequent Year
REVENUES			
LCFF Sources (8010-8099)	$ -	$ -	$ -
Remaining Revenues (8100-8799)	$ 17,148,035	$18,272,814	$18,657,543
TOTAL REVENUES	$ 17,148,035	$ 18,272,814	$ 18,657,543
EXPENDITURES			
Certificated Salaries (1000-1999)	$ -		$ -
Classified Salaries (2000-2999)	$ 5,183,069	$ 5,212,324	$ 5,257,317
Employee Benefits (3000-3999)	$ 3,212,215	$ 3,469,645	$ 3,671,857
Books and Supplies (4000-4999)	$ 7,097,536	$ 7,494,424	$ 7,664,843
Services, Other Operating Expenses (5000-5999)	$ 845,348	$ 854,951	$ 865,866
Capital Outlay (6000-6999)	$ 185,000	$ 290,000	$ 325,000
Other Outgo (7100-7299) (7400-7499)	$ -	$ -	$ -
Direct Support/Indirect Cost (7300-7399)	$ 606,881	$ 633,566	$ 649,508
Other Adjustments	$ -		
TOTAL EXPENDITURES	$ 17,130,049	$ 17,954,910	$ 18,434,391
OPERATING SURPLUS (DEFICIT)	$ 17,986	$ 317,904	$ 223,152
TRANSFERS IN & OTHER SOURCES (8910-8979)	$ 175,000	$ 175,000	$ 175,000
TRANSFERS OUT & OTHER USES (7610-7699)	$ 14,433	$ 14,433	$ 14,433
CONTRIBUTIONS (8980-8999)	$ -	$ -	$ -
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	$ 178,553	$ 478,471	$ 383,719
BEGINNING BALANCE	$ 3,205,130	$ 3,383,683	$ 3,862,154
CURRENT-YEAR ENDING BALANCE	$ 3,383,683	$ 3,862,154	$ 4,245,873
COMPONENTS OF ENDING BALANCE:			
Nonspendable	$ 193,050	$ 193,050	$ 193,050
Restricted	$ 3,089,164	$ 3,669,104	$ 4,052,823
Reserved for Economic Uncertainties	$ -		
Committed	$ -		
Assigned	$ 101,469		
Reserve for Economic Uncertainties Percentage	0.00%	0.00%	0.00%

SACRAMENTO COUNTY OFFICE OF EDUCATION

PUBLIC DISCLOSURE OF COLLECTIVE BARGAINING AGREEMENT

In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5, and CCR, Title V, Section 15449

Name of School District:	*San Juan Unified School District - Deferred Maintenance, Building, Capital Facilities and Self Insurance Funds*
Name of Bargaining Units:	**SJTA, SJAA, SJPEC, SJSA, Teamsters, Unrepresented, Confidential, Supervisors, Board Contracted Cabinet members & Teamsters**
Certificated, Classified, Other:	**Certificated & Classified, Board Contracts**

The proposed agreements cover the period beginning: **July 1, 2019** (date) **and ending:** **June 30, 2021 or later** (date)

The Governing Board will act upon the proposed agreement(s) on: **January 28, 2020** (date)

Note: This form, along with a copy of the proposed agreement, must be submitted to the County Office at least ten (10) working days prior to the date the Governing Board will take action. This form must also be available to the public at least ten (10) working days prior to the date the governing board will take action on the proposed bargaining agreements.

A. Proposed Change in Compensation

Page 8 (Other Funds Section)

	Compensation	Annual Cost Prior to Proposed Agreement	Fiscal Impact of Proposed Agreement Year 1 Increase (Decrease)	Year 2 Increase (Decrease)	Year 3 Increase (Decrease)
		FY 2019-20 1st Interim 12/10/2019 Board Approved	FY 2019-20	FY 2020-21	FY 2021-22
1	**Salary Schedule** (This is to include Step and Columns, which is also reported separately in Item 6)	$2,231,317	$0	$0	$0
			0.00%	0.00%	0.00%
2	**Other Compensation** Stipends, Bonuses, Longevity, Overtime, Differential, Callback or Standby Pay, etc.	$0	$17,268	-$17,268	$0
			0.77%	-0.77%	0.00%
	Description of other compensation				
3	**Statutory Benefits -** STRS, PERS, FICA WC, UI, Medicare, etc. (retiree h&w and long-term sick leave included in section 4)	$562,232	$5,063	-$5,063	$0
			0.90%	-0.90%	0.00%
4	**Health/Welfare Plans -** includes medical, dental, vision, life insurance, retiree h&w, long-term sick leave, cash option	$436,534	$838	-$838	$0
			0.19%	-0.19%	0.00%
5	**Total Compensation -** Add Items 1 through 4 to equal 5	$3,230,083	$23,169	-$23,169	$0
			0.72%	-0.72%	0.00%
6	**Step and Column - Due to movement plus any changes due to settlement. 2019-20, 2020-21 and 2021-22 step and column increases have already been included in the multi-year projection. This is a subset of Item No. 1**	$18,806	$0	$0	$0
7	**Total Number of Represented Employees** (Use FTEs if appropriate)	7.92	7.92	7.92	7.92
8	**Total Compensation Average Cost per Employee**	$407,839	$2,925	-$2,925	$0
			0.72%	-0.72%	0.00%
9	**Total Salary Compensation**	$2,231,317	$17,268	-$17,268	$0
	Total Salary Compensation %		0.77%	-0.77%	0.00%

A. Proposed Change in Compensation for : Page 9 (Other Funds Section)		Deferred Maintenance, Building, Capital Facilities and Self Insurance Funds			
	Compensation	Annual	Fiscal Impact of Proposed Agreement		
		Cost Prior to	Year 1	Year 2	Year 3
		Proposed Agreement	Increase (Decrease)	Increase (Decrease)	Increase (Decrease)
		Certificated & Classified, Board Contracts	FY 2019-20	FY 2020-21	FY 2021-22
1	**Salary Schedule** (This is to include Step and Columns, which is also reported separately in Item 6)	$2,231,317	$0	$0	$0
	Certificated Salaries - Object 1xxx	$0			
	Classified Salaries - Object 2xxx	$2,231,317			
	Salary Increase Certificated Salaries - Object 1xxx		$0	$0	
	Salary Increase Classified Salaries - Object 2xxx		$0	$0	
	Other -Certificated Salaries - Object 1xxx			$0	
	Other - Classified Salaries - Object 2xxx		$0	0	
2	**Other Compensation** Stipends, Bonuses, Longevity, Overtime, Differential, Callback or Standby Pay, etc.	$0	$17,268	-$17,268	$0
	One-Time Payment-Certificated Salaries-Object 1xxx		$0	$0	
	One-Time PaymentClassified Salaries-Object 2xxx		$17,268	-$17,268	
3	**Statutory Benefits -** STRS, PERS, FICA, WC, UI, Medicare, etc. (Retiree H&W & Long-term Sick Leave included in section 4)	$562,232	$5,063	-$5,063	$0
	Certificated Payroll costs	$0			
	Classified Payroll costs	$562,232			
	Salary Increase - Certificated payroll costs	$0	$0	$0	
	Salary Increase - Classified payroll costs	$0	$0	$0	
	One Time Payment-Certificated payroll costs		$0	$0	
	One Time Payment-Classified payroll costs		$5,063	-$5,063	
	Other-Certificated payroll costs			$0	
	Other-Classified payroll costs			$0	$0
4	**Health/Welfare Plans -** medical, dental, vision, life insurance, retiree h&w, lt sick leave, cash option (obj 340x, 395x, 37xx, 396x, 391x)	$436,534	$838	-$838	$0
	Medical/Dental/VSP - Object 340x	$319,028			
	Life Insurance - Object 395x	$1,672			
	Retiree H&W & Long-term Sick Leave - * See below for rates	$111,950	$838	-838	$0
	Cash Option - Object 391x	$3,884			
5	**Total Compensation -** Add Items 1 through 4 to equal 5	$3,230,083	$23,169	-$23,169	$0
6	**Step and Column - Related to movement plus any changes due to settlement. This is a subset of Item No. 1**	$18,806		$0	$0
	FTE - Using Oct 31, 2019 FTE for cost prior to proposed agreements. Years 1 - 3 have changes only due to the proposed agreements.	7.92	7.92	7.92	7.92

* Rates:	FY 2019-20	FY 2019-20	FY 2020-21	FY 2021-22
Retiree H&W & Long-term Leave Rates - Certificated	2.50%	2.50%	2.60%	2.60%
Retiree H&W & Long-term Leave Rates - Classified	4.85%	4.85%	4.95%	4.95%
Health & Welfare	4.10%	4.10%	6.50%	7.75%
Step & Column - Certificated	0.70%		0.80%	0.80%
Step & Column - Classified	0.85%		0.90%	0.90%

H. IMPACT OF PROPOSED AGREEMENT ON CURRENT YEAR OPERATING BUDGET

Page 10 (Other Funds Section)

Deferred Maintenance, Building,
Capital Facilities and Self Insurance Funds
SJTA, SJAA, SJPEC, SJSA, Teamsters, Unrepresented, Confidential, Supervisors, Board Contracted Cabinet members &

Enter Bargaining Unit/Group: ***Teamsters***

	Column 1	Column 2	Column 3	Column 4
	FY 2019-20 1st Interim 12/10/2019 Board Approved	Certificated & Classified, Board Contracts	Other Revisions, including proposed budget revision	FY 2019-20 Proposed Budget after adjustments
REVENUES				
LCFF Sources (8010-8099)			$ -	$ -
Remaining Revenues (8100-8799)	$ 26,040,788		$ -	$ 26,040,788
TOTAL REVENUES	**$ 26,040,788**	**$ -**	**$ -**	**$ 26,040,788**
EXPENDITURES				
Certificated Salaries (1000-1999)	$ -	$ -	$ -	$ -
Classified Salaries (2000-2999)	$ 2,231,317	$ 17,268	$ -	$ 2,248,585
Employee Benefits (3000-3999)	$ 998,766	$ 5,901	$ -	$ 1,004,667
Books and Supplies (4000-4999)	$ 1,100,778		$ -	$ 1,100,778
Services, Other Operating Expenses (5000-5999)	$ 24,785,433		$ -	$ 24,785,433
Capital Outlay (6000-6999)	$ 154,544,587		$ -	$ 154,544,587
Other Outgo (7100-7299) (7400-7499)	$ 10,040,239		$ -	$ 10,040,239
Direct Support/Indirect Cost (7300-7399)	$ -		$ -	$ -
Other Adjustments	$ -		$ -	$ -
TOTAL EXPENDITURES	**$ 193,701,120**	**$ 23,169**	**$ -**	**$ 193,724,289**
OPERATING SURPLUS (DEFICIT)	**$ (167,660,332)**	**$ (23,169)**	**$ -**	**$ (167,683,501)**
TRANSFERS IN & OTHER SOURCES (8910-8979)	$ 6,399,042		$ -	$ 6,399,042
TRANSFERS OUT & OTHER USES (7610-7699)	$ 75,000		$ -	$ 75,000
CONTRIBUTIONS (8980-8999)	$ -		$ -	$ -
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	**$ (161,336,290)**	**$ (23,169)**	**$ -**	**$ (161,359,459)**
BEGINNING BALANCE	$ 273,769,907			$ 273,769,907
Prior-Year Adjustments/Restatements (9793/9795)				
CURRENT-YEAR ENDING BALANCE	**$ 112,433,617**	**$ (23,169)**		**$ 112,410,448**
COMPONENTS OF ENDING BALANCE:				
Nonspendable				
Restricted	$ 86,234,195	$ (43,498)		$ 86,190,697
Reserved for Economic Uncertainties (9770)	$ -			$ -
Committed	$ -			$ -
Assigned	$ 898,014	$ 20,329		$ 918,343
Restricted Net Position	$ 23,573,024			$ 23,573,024
Unappropriated Amounts/Net Position (9790)	**$ 1,728,384**			$ 1,728,384

I. IMPACT OF PROPOSED AGREEMENT ON SUBSEQUENT YEARS
Page 12 (Other Funds Section)

Deferred Maintenance, Building, Capital Facilities & Self Insurance Funds
SJTA, SJAA, SJPEC, SJSA, Teamsters, Unrepresented, Confidential, Supervisors, Board Contracted Cabinet members & Teamsters

Enter Bargaining Unit/Group:

	FY 2019-20	FY 2020-21	FY 2021-22
	FY 2019-20 Proposed Budget after adjustments	Certificated & Classified, Board Contracts	Second Subsequent Year
REVENUES			
LCFF Sources (8010-8099)	$ -	$ -	$ -
Remaining Revenues (8100-8799)	$ 26,040,788	$ 26,566,900	$ 26,872,836
TOTAL REVENUES	$ 26,040,788	$ 26,566,900	$ 26,872,836
EXPENDITURES			
Certificated Salaries (1000-1999)	$ -	$ -	$ -
Classified Salaries (2000-2999)	$ 2,248,585	$ 2,190,614	$2,184,707
Employee Benefits (3000-3999)	$ 1,004,667	$ 1,194,958	$1,191,909
Books and Supplies (4000-4999)	$ 1,100,778	$ 1,063,638	$1,097,091
Services, Other Operating Expenses (5000-5999)	$ 24,785,433	$ 24,207,853	$24,870,594
Capital Outlay (6000-6999)	$ 154,544,587	$ 131,008,166	$135,089,595
Other Outgo (7100-7299) (7400-7499)	$ 10,040,239	$ 127,564	
Direct Support/Indirect Cost (7300-7399)	$ -		
Other Adjustments	$ -		
TOTAL EXPENDITURES	$ 193,724,289	$ 159,792,793	$ 164,433,896
OPERATING SURPLUS (DEFICIT)	$ (167,683,501)	$ (133,225,893)	$ (137,561,060)
TRANSFERS IN & OTHER SOURCES (8910-8979)	$ 6,399,042	$ 232,000,000	$ 2,000,000
TRANSFERS OUT & OTHER USES (7610-7699)	$ 75,000		
CONTRIBUTIONS (8980-8999)	$ -	$ -	$ -
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	$ (161,359,459)	$ 98,774,107	$ (135,561,060)
BEGINNING BALANCE	$ 273,769,907	$ 112,410,448	$ 211,184,555
CURRENT-YEAR ENDING BALANCE	$ 112,410,448	$ 211,184,555	$ 75,623,495
COMPONENTS OF ENDING BALANCE:			
Nonspendable	$ -		
Restricted	$ 86,190,697	$ 184,985,133	$ 49,424,073
Reserved for Economic Uncertainties	$ -		
Committed	$ -		
Assigned	$ 918,343	$ 898,014	$ 898,014
Restricted Net Position	$ 23,573,024	$ 23,573,024	$ 23,573,024
Unappropriated Amounts/Net Position (9790)	$ 1,728,384	$ 1,728,384	$ 1,728,384
Reserve for Economic Uncertainties Percentage	0.00%	0.00%	0.00%

SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION

AGENDA ITEM: I-3 (b)

MEETING DATE: 01/28/2020

SUBJECT: Tentative Agreement with the San Juan Professional Educators Coalition and the San Juan Unified School District for 2019-2020 and 2020-2021

CHECK ONE:
For Discussion: ☐
For Action: ☒
Report: ☐
Workshop: ☐
Recognition: ☐
Emergency Action: ☐

DEPARTMENT: Schools and Labor Relations

ACTION REQUESTED:
The superintendent is recommending that the board approve the San Juan Professional Educators Coalition tentative agreement.

RATIONALE/BACKGROUND:
The district shall provide a one-time, off-schedule payment equal to 2.00% of each member's base salary (Appendix E) and stipends included in contract for the full or partial period between 07/01/2019 to 06/30/2020. The one-time, off-schedule payment will be paid within 60 days of board ratification. This one-time, off-schedule payment will not increase base compensation for the 2019-2020 fiscal year.

This tentative agreement was ratified by the San Juan Professional Educators Coalition on November 22, 2019.

ATTACHMENTS:
A: Tentative Agreement
B: AB 1200 Public Disclosure of Collective Bargaining Agreement [see item I-3(a)]

PREVIOUS STAFF/BOARD ACTION:
Superintendent's Cabinet: 11/11/2019, 11/18/2019
Board of Education: 01/14/2020

FISCAL IMPACT:
Current Budget: See attached AB 1200 document
Additional Budget: N/A
Funding Source: N/A
(Unrestricted Base, Supplemental, other restricted, etc.)
Current Year Only ☐ Ongoing: ☐

LCAP/STRATEGIC PLAN:
Goal: N/A Focus: N/A
Action: N/A

Strategic Plan: N/A

FINANCIAL DATA:
In accordance with AB 1200 (Chapter 1213/1991); GC 3547.5; and CCR, Title V, Section 15449, Fiscal Services has prepared an analysis of the fiscal impact of the proposed agreement and has submitted it to the Sacramento County Office of Education *[reference agenda item I-3(a), attachment B: AB 1200 Public Disclosure of Collective Bargaining Agreement]*. Costs to the general fund for the San Juan Professional Educators Coalition tentative collective bargaining agreement are: an increase of $454,211 in 2019-2020 and a decrease of ($454,211) in 2020-2021.

PREPARED BY: Jim Shoemake, Assistant Superintendent, Schools and Labor Relations

APPROVED BY: Kent Kern, Superintendent of Schools

Tentative Agreement
Between
San Juan Unified School District (District)
and the
San Juan Professional Educators Coalition (Coalition)

Article 12 - Salary

The District shall provide a one-time off schedule payment equal to 2.00% of each member's base salary (Appendix E) and stipends included in contract for the full or partial period between 07/01/19 to 06/30/20. The one-time off schedule payment will be paid within 60 days of board ratification. This one-time off schedule payment will not increase base compensation for the 2019-20 fiscal year.

12.3 Summer School: If an employee works during summer school the District shall pay the employee the designated ~~**stipend amount**~~ **hourly rate** as set forth on Appendix "E", and shall contribute the appropriate contribution ~~for service credit~~ towards his/her retirement program (STRS or PERS) as required and specified by the retirement system.

Article 1 - Term

1.06.1 Two (2) year contract for the years 2019-20 and 2020-21

1.06.3 The parties agree to reopen negotiations for the 2020-21 school year. The following will be considered reopeners: Article 11 (Salary) and Article 9 (Employee Benefits). Unless by mutual agreement, no other Articles will be reopened for the 2020-21 school year.

Article 5 - Evaluation of Job Performance

The district and coalition agree that employee evaluations provide the district with important information to use when making employment decisions, such as promotions, demotions and terminations. While the district does possess the right to terminate an employee for cause, every effort will be made to utilize the evaluation process to ensure that all employees receive specific feedback related to their job performance.

5.1.1
The evaluation process provides an opportunity for a member to conduct reflection of professional growth and it provides an opportunity for an evaluator/supervisor to provide specific feedback related to educational leadership standards. The evaluatee is responsible for effective performance within all six California Professional Standards for Educational Leaders (Appendix

C-2) ~~; Page 2 of 5)~~ and the responsibilities described in the District's job description. A member may elect either the ~~Mutual Commitments and Expectations Evaluation Process (MCE) or the~~ Option A or Option B SJPEC Evaluation Tool **(Appendix C-1)** ~~Process~~ based upon specific criteria noted below.

~~**5.1.4 SJPEC Evaluation Mutual Commitments and Expectations (MCE) Process**~~
~~**The MCE process is available to SJPEC members who have completed three years of SJPEC service in San Juan and have all three prior evaluations checked "Continuation without Reservation." The member and the evaluator meet no later than the third Friday in October at the Goal Setting Conference and review the completed MCE Template (Appendix C-2; page 1). The member and evaluator meet for an End-of-Year Conference no later than June 20th to review the member's responsibilities and objectives and his/her performance within all six California Professional Standards for Educational Leaders (Appendix C-2; pages 3a, 3b and 3c).**~~

Article 9 - Work Year and Hours

Article 9.4 Flex Day: Employees in the Unit who, with the knowledge and concurrence of their supervisor, work on a day not part of their normal contract work year calendar, have the right to exchange that extra day for a work day that is part of their work year calendar ("flex day"). Every attempt shall be made to avoid scheduling a "flex day" when students or teachers are present or meetings are scheduled. **Flex days are not to be used for weekend school related functions or business unless the event is considered non-routine and your supervisor approves of the request.** The scheduling of such day shall be discussed with and subject to prior approval (see SJPEC Flex Day Protocol form, Appendix G) by the employee's supervisor.

The District agrees to provide the following minimal staffing out of base funding. The District or individual sites may choose to enhance with alternative funding sources:

- **a. Elementary Schools**
  - **i. Principal**
    1. **1.0 FTE per school**

    Schools with enrollment below 275 will require additional district assignment for the principal
  - **ii. Vice Principals**
    1. **1.0 FTE per school with an enrollment over 700**
- **b. K-8 Schools**
  - **i. Principal**
    1. **1.0 FTE per school**

ii. **Vice Principal**
    1. **1.0 FTE per school with an enrollment over 700**

c. **Middle Schools**
    i. **Principal**
        1. **1.0 FTE per school**
    ii. **Vice Principal(s)**
        1. **A total of 8.00 FTEs for all Middle Schools to be assigned by the Superintendent or designee**

d. **High Schools (Excluding Alternative Learning Centers)**
    i. **Principals, 1.0 FTE per school**
    ii. **Vice Principal(s)**
        1. **1.00 FTE per school with an enrollment of less than 850 Allocation is initially based on budget development enrollment projections.**
        2. **2.00 FTE per school with an enrollment of 850 to 1,750**
        3. **3.00 FTE per school with an enrollment of more than 1,750**

Allocations will be adjusted based on enrollment at the end of the 3rd full week of instruction.

Article 13 - Fringe Benefits

13.3.1 If an employee wishes to enroll in the District sponsored buy up vision plan, which permits coverage for eligible dependents, the employee will be responsible for paying the full cost of this coverage for their dependents, as well as any additional premium for their own buy up plan coverage.

Jim Shoemake 11/14/19

Jim Shoemake Date
Assistant Superintendent
Schools and Labor Relations
San Juan Unified School District

11/14/19

Suzanne Ambrosini Date
President
San Juan Professional Educators Coalition

San Juan Unified School District

SJPEC ~~Evaluation~~ Performance Review Cover Sheet **APPENDIX "C-1"**

~~Evaluation~~ Performance Review Year _____

Page 1

Name _____ Position _____ Location(s) _____ **~~Evaluator~~ Supervisor** _____

Status of previous year **~~evaluation~~ performance review**:

- ☐ New to position/job classification
- ☐ Continuation without reservation
- ☐ Continuation with support as noted/mid-year **~~evaluation~~ performance review** (improvement plan required)
- ☐ Five-year cycle

The **~~evaluation~~ performance review** process is twofold: it provides an opportunity for a member to conduct a reflection of professional growth and it provides an opportunity for **~~an evaluator/~~supervisor** to provide specific feedback related to educational leadership standards. The **~~evaluatee~~ employee** is responsible for effective performance within all six standards and the responsibilities described in the District's job description.

Option "A" (See Article 5 of the SJPEC contract for details)
Option "B" (See Article 5 of the SJPEC contract for details)
~~Mutual Commitments and Expectations (See Article 5 of the SJPEC contract for details)~~
Five-Year Cycle Summative **~~Evaluation~~ Reflection** Statement (See Article 5 of the SJPEC contract for details)

This year's SJPEC **~~Evaluation~~ performance review** process for this employee is:

☐ Option A ☐ Option B Eligible for Alternate Year ~~☐ MCE~~ ☐ Five-Year Cycle (Year ___ of 5)

Conference Dates:

Goal Setting Conference to Include:

- ➢ Review of CA Professional Standards for Educational Leaders and any special Board adopted goals
- ➢ Starting point from previous year's **~~evaluation~~ performance review**
- ➢ Review of contractual timelines related to the **~~evaluation~~ performance review**
- ➢ Set three mutually-agreed-upon focus goals ~~(page 3 of 5~~ 3a, 3b, 3c)

Goal Setting Date _____ (no later than third Friday in October) ☐ Comments attached

_____ _____

~~Evaluator~~ Supervisor **~~Evaluatee~~ Employee**

Mid-Year Conference Date: _____ for *Option "A" and any employee in need of additional supports (no later than February 1st)*

- ➢ Review of CA Professional Standards for Educational Leaders and any special Board adopted goals
- ➢ Review of contractual timelines related to the **~~evaluation~~ performance review**

☐ **Comments attached** ☐ **Improvement plan attached**

_____ _____

~~Evaluator~~ Supervisor **~~Evaluatee~~ Employee**

End of Year Summary of Overall Performance: (no later than June 20th)

- ☐ Continuation without reservation
- ☐ Continuation with support as noted/mid-year **~~evaluation~~ reflection** (improvement plan required)
- ☐ Recommendation of non-continuation (Must be completed prior to March 1; documentation must be attached)
- ☐ Eligible for Option B
- ~~☐ Eligible for MCE~~
- ☐ Five-Year cycle

_____ _____ _____ _____

~~Evaluator~~ Supervisor Date ~~Evaluatee~~ Employee Date

*The **~~evaluatee's~~ employee's** signature does not constitute an agreement with the **~~evaluator's~~ supervisor's** comments or ratings, but is an acknowledgement that the document has been received. **~~Evaluatees~~ employees** have the right to submit an additional written response for inclusion in this report.*

Original-Human Resources *Copies to* **~~Evaluator~~ Supervisor** *and* **~~Evaluatee~~ Employee** Attachments: Yes No

Using the **California Professional Standards for Educational Leaders (below)** as a guide, the member is to select three **goals.**

Standard 1: Development and Implementation of a Shared Vision.

- Education leaders facilitate the development and implementation of a shared vision of learning and growth of all students.
  - Element 1A: Student-Centered Vision Leaders shape a collective vision that uses multiple measures of data and focuses on equitable access, opportunities, and outcomes for all students
    - 1A-1 Advance support for the academic, linguistic, cultural, social-emotional, behavioral, and physical development of each learner.
    - 1A-2 Cultivate multiple learning opportunities and support systems that build on student assets and address student needs.
    - 1A-3 Address achievement and opportunity disparities between student groups, with attention to those with special needs; cultural, racial, and linguistic differences; and disadvantaged socio-economic backgrounds.
    - 1A-4 Emphasize the expectation that all students will meet content and performance standards.
  - Element 1B: Developing Shared Vision Leaders engage others in a collaborative process to develop a vision of teaching and learning that is shared and supported by all stakeholders.
    - 1B-1 Embrace diverse perspectives and craft consensus about the vision and goals.
    - 1B-2 Communicate the vision so the staff and school community understands it and uses it for decision-making.
    - 1B-3 Build shared accountability to achieve the vision by distributing leadership roles and responsibilities among staff and community.
    - 1B-4 Align the vision and goals with local, state, and federal education laws and regulations.
  - Element 1C: Vision Planning and Implementation Leaders guide and monitor decisions, actions, and outcomes using the shared vision and goals.
    - 1C-1 Include all stakeholders in a process of continuous improvement (reflection, revision, and modification) based on the systematic review of evidence and progress.
    - 1C-2 Use evidence (including, but not limited to student achievement, attendance, behavior and school climate date, research, and best practices) to shape and revise plans programs, and activities that advance the vision. California Professional Standards for Education Leaders 5 2014
    - 1C-3 Marshal, equitably allocate, and efficiently use human, fiscal, and technological resources aligned with the vision of learning for all students.

Standard 2: Instructional Leadership.

- Education leaders shape a collaborative culture of teaching and learning, informed by professional standards and focused on student and professional growth.
  - Element 2A: Professional Learning Culture Leaders promote a culture in which staff engages in individual and collective professional learning that results in their continuous improvement and high performance.
    - 2A-1 Establish coherent, research-based professional learning aligned with organizational vision and goals for educator and student growth.
    - 2A-2 Promote professional learning plans that focus on real situations and specific needs related to increasing the learning and well-being of all staff and students.
    - 2A-3 Capitalize on the diverse experience and abilities of staff to plan, implement, and assess professional learning.
    - 2A-4 Strengthen staff trust, shared responsibility, and leadership by instituting structures and processes that promote collaborative inquiry and problem solving.

- Element 2B: Curriculum and Instruction Leaders guide and support the implementation of standards-based curriculum, instruction, and assessments that address student expectations and outcomes.
  - 2B-1 Develop a shared understanding of adopted standards-based curriculum that reflects student content and performance expectations.
  - 2B-2 Promote and monitor the use of state frameworks and guides that offer evidence-based instructional and support strategies to increase learning for diverse student assets and needs.
  - 2B-3 Provide access to a variety of resources that are needed for the effective instruction and differentiated support of all students.
  - 2B-4 Guide and monitor the alignment of curriculum, instruction, assessment and professional practice.

- Element 2C: Assessment and Accountability Leaders develop and use assessment and accountability systems to monitor, improve and extend educator practice, program outcomes and student learning.
  - 2C-1 Define clear purposes, goals, and working agreements for collecting and sharing information about professional practice and student outcomes.
  - 2C-2 Guide staff and the community in regular disaggregation and analysis of local and state student assessment results and program data.
  - 2C-3 Use information from a variety of sources to guide program and professional learning planning, implementation and revisions.
  - 2C-4 Use professional expectations and standards to guide, monitor, support, and supervise to improve teaching and learning.
  - 2C-5 Apply a variety of tools and technology to gather feedback, organize and analyze multiple data sources, and monitor student progress directed toward improving teaching and learning.

Standard 3: Management and Learning Environment.

- Education leaders manage the organization to cultivate a safe and productive learning and working environment.
  - Element 3A: Operations and Facilities Leaders provide and oversee a functional, safe and clean learning environment.
    - 3A-1 Systematically review the physical plant and grounds to ensure that they are safe, meet Americans with Disabilities Act (ADA) requirements, and comply with conditions that support accessibility for all students.
    - 3A-2 Collaborate with the district to monitor and maintain student services (e.g., food, transportation) that contribute to student learning, health and welfare.
    - 3A-3 Manage the acquisition, distribution, and maintenance of equipment, materials, and technology needed to meet the academic, linguistic, cultural, social-emotional, and physical requirements of students.
    - 3A-4 Work with stakeholders and experts to plan and implement emergency and risk management procedures for individuals and the site.

  - Element 3B: Plans and Procedures Leaders establish structures and employ policies and processes that support students to graduate ready for college and career.
    - 3B-1 Develop schedules and assign placement that are student-centered and maximize instructional time and staff collaboration.
    - 3B-2 Manage legal and contractual agreements and storage of confidential records (both paper and electronic) to insure student security and confidentiality.
    - 3B-3 Set clear working agreements that support sharing problems, practices and results within a safe and supportive environment.
    - 3B-4 Engage stakeholders in using problem solving and decision-making processes and distributed leadership to develop, monitor, evaluate and revise plans and programs.

  - Element 3C: Climate Leaders facilitate safe, fair, and respectful environments that meet the intellectual, linguistic, cultural, social-emotional, and physical needs of each learner.
    - 3C-1 Strengthen school climate through participation, engagement, connection, and a sense of belonging among all students and staff.
    - 3C-2 Implement a positive and equitable student responsibility and behavior system with teaching, intervention and prevention strategies and protocols that are clear, fair, incremental, restorative, culturally responsive, and celebrate student and school achievement.

- 3C-3 Consistently monitor, review, and respond to attendance, disciplinary and other relevant data to improve school climate and student engagement and ensure that management practices are free from bias and equitably applied to all students.

- Element 3D: Fiscal and Human Resources Leaders align fiscal and human resources and manage policies and contractual agreements that build a productive learning environment.
  - 3D-1 Provide clear rationale for decisions and distribute resources equitably to advance shared vision and goals focused on the needs of all students.
  - 3D-2 Work with the district and school community to focus on both short and long-term fiscal management.
  - 3D-3 Actively direct staff hiring and placement to match staff capacity with student academic and support goals.
  - 3D-4 Engage staff in professional learning and formative assessments with specific feedback for continuous growth.
  - 3D-5 Conduct personnel evaluations to improve teaching and learning, in keeping with district and state policies.
  - 3D-6 Establish and monitor expectations for staff behavior and performance, recognizing positive results and responding to poor performance and/or inappropriate or illegal behavior directly and in a timely and systematic manner.

Standard 4: Family and Community Engagement.

- Education leaders collaborate with families and other stakeholders to address diverse student and community interests and mobilize community resources.
  - Element 4A: Parent and Family Engagement Leaders meaningfully involve all parents and families, including underrepresented communities, in student learning and support programs.
    - 4A-1 Establish a welcoming environment for family participation and education by recognizing and respecting diverse family goals and aspirations for students.
    - 4A-2 Follow guidelines for communication and participation established in federal and state mandates, district policies, and legal agreements.
    - 4A-3 Solicit input from and communicate regularly with all parents and families in ways that are accessible and understandable.
    - 4A-4 Engage families with staff to establish academic programs and supports that address individual and collective student assets and needs.
    - 4A-5 Facilitate a reciprocal relationship with families that encourages them to assist the school and to participate in opportunities that extend their capacity to support students.

  - Element 4B: Community Partnerships Leaders establish community partnerships that promote and support student to meet performance and content expectations and graduate ready for college and career.
    - 4B-1 Incorporate information about family and community expectations and needs into decision-making and activities.
    - 4B-2 Share leadership responsibility by establishing community, business, institutional and civic partnerships that invest in and support the vision and goals.
    - 4B-3 Treat all stakeholder groups with fairness and respect and work to bring consensus on key issues that affect student learning and well-being.
    - 4B-4 Participate in local activities that engage community members and staff in communicating school successes to the broader community.

  - Element 4C: Community Resources and Services Leaders leverage and integrate community resources and services to meet the varied needs of all students.
    - 4C-1 Seek out and collaborate with community programs and services that assist students who need academic, mental, linguistic, cultural, social-emotional, physical, or other support to succeed in school.
    - 4C-2 Build mutually beneficial relationships with external organizations to coordinate the use of school and community facilities.
    - 4C-3 Work with community emergency and welfare agencies to develop positive relationships.
    - 4C-4 Secure community support to sustain existing resources and add new resources that address emerging student needs.

Standard 5: Ethics and Integrity.

- Education leaders make decisions, model, and behave in ways that demonstrate professionalism, ethics, integrity, justice, and equity and hold staff to the same standards.
  - Element 5A: Reflective Practice Leaders act upon a personal code of ethics that requires continuous reflection and learning.
    - 5A-1 Examine personal assumptions, values, and beliefs to address students' various academic, linguistic, cultural, social-emotional, physical, and economic assets and needs and promote equitable practices and access appropriate resources.
    - 5A-2 Reflect on areas for improvement and take responsibility for change and growth.
    - 5A-3 Engage in professional learning to be up-to-date with education research, literature, best practices and trends to strengthen their ability to lead.
    - 5A-4 Continuously improve cultural proficiency skills and competency in curriculum, instruction, and assessment for all learners.
    - 5A-5 Sustain personal motivation, commitment, energy, and health by balancing professional and personal responsibilities.

  - Element 5B: Ethical Decision-Making Leaders guide and support personal and collective actions that use relevant evidence and available research to make fair and ethical decisions.
    - 5B-1 Consider and evaluate the potential moral and legal consequences of decisions.
    - 5B-2 Review multiple measures of data and research on effective teaching and learning, leadership, management practices, equity and other pertinent areas to inform decision-making.
    - 5B-3 Identify personal and institutional biases and remove barriers that derive from economic, social-emotional, racial, linguistic, cultural, physical, gender, or other sources of educational disadvantage or discrimination.
    - 5B-4 Commit to making difficult decisions in service of equitable outcomes for students, staff and the school community

  - Element 5C: Ethical Action Leaders recognize and use their professional influence with staff and the community to develop a climate of trust, mutual respect, and honest communication necessary to consistently make fair and equitable decisions on behalf of all students.
    - 5C-1 Communicate expectations and support for professional behavior that reflects ethics, integrity, justice, and equity.
    - 5C-2 Use a variety of strategies to lead others in safely examining personal assumptions and respectfully challenge beliefs that negatively affect improving teaching and learning for all students.
    - 5C-3 Encourage and inspire others to higher levels of performance, commitment, and motivation by modeling transparent and accountable behavior.
    - 5C-4 Protect the rights and appropriate confidentiality of students, staff, and families
    - 5C-5 Promote understanding and follow the legal, social, and ethical use of technology among all members of the school community.

Standard 6: External Context and Policy.

- Education leaders influence political, social, economic, legal, and cultural contexts affecting education to improve education policies and practices.
  - Element 6A: Understanding and Communicating Policy Leaders actively structure and participate in opportunities that develop greater public understanding of the education policy environment.
    - 6A-1 Operate consistently within the parameters of federal, state, and local laws, policies, regulations, and statutory requirements.
    - 6A-2 Understand and can explain the roles of school leaders, boards of education, legislators and other key stakeholders in making education policy.
    - 6A-3 Welcome and facilitate conversations with the local community about how to improve learning and achievement for all students, including English Learners, and students needing additional support
    - 6A-4 Facilitate discussions with the public about federal, state and local laws, policies, regulations, and statutory requirements affecting continuous improvement of educational programs and outcomes.

- 6A-5 Work with local leaders to assess, analyze and anticipate emerging trends and initiatives and their impact on education.

- Element 6B: Professional Influence Leaders use their understanding of social, cultural, economic, legal and political contexts to shape policies that lead to all students to graduate ready for college and career.
  - 6B-1 Advocate for equity and adequacy in providing for students' and families' educational, linguistic, cultural, social-emotional, legal, physical, and economic needs, so every student can meet education expectations and goals.
  - 6B-2 Support public policies and administrative procedures that provide for present and future needs of all children and families and improve equity and excellence in education.
  - 6B-3 Promote public policies that ensure the equitable distribution of resources and support services for all students.

- Element 6C: Policy Engagement Leaders engage with policymakers and stakeholders to collaborate on education policies focused on improving education for all students.
  - 6C-1 Work with the governing board, district and local leaders to influence policies that benefit students and support the improvement of teaching and learning.
  - 6C-2 Actively develop relationships with a range of stakeholders, policymakers, and researchers to identify and address issues, trends, and potential changes that affect the context and conduct of education.
  - 6C-3 Collaborate with community leaders and stakeholders with specialized expertise to inform district and school planning, policies and programs that respond to cultural, economic, social and other emerging issues.

San Juan Unified School District
~~SJPEC Evaluation Member Reflection~~
Goal Setting & Reflection Form
(To be completed by the employee ~~member~~)
Page 3a

Name _____

Goal:
Standard number(s) or elements that apply: ____

Rationale for selecting this **goal and standard** for professional growth/goal setting (brief examination of current status related to the needs of the site/position):

Agreement on Standard and Goal:
~~Evaluator~~ Supervisor _____ Date _____ **~~Evaluatee~~ Employee** _____ Date _____

Mid-Year Conference Review: Results (looking back to examine growth, change, next steps):

~~Evaluatee~~ Employee _____ Date _____

San Juan Unified School District
~~SJPEC Evaluation Member Reflection~~
Goal Setting & Reflection Form
(To be completed by the employee ~~member~~)
Page 3b

Name _____

Goal:
Standard number(s) or elements that apply: ____

Rationale for selecting this **goal and standard** for professional growth/goal setting (brief examination of current status related to the needs of the site/position):

Agreement on Standard and Goal:
~~Evaluator~~ Supervisor _____ Date _____ **~~Evaluatee~~ Employee** _____ Date _____

Mid-Year Conference Review: Results (looking back to examine growth, change, next steps):

~~Evaluatee~~ Employee _____ Date _____

San Juan Unified School District
~~**SJPEC Evaluation Reflection**~~
Goal Setting & Reflection Form
(To be completed by the employee ~~member~~)
Page 3c

Name _____

Goal:
Standard number(s) or elements that apply: ____

Rationale for selecting this **goal and standard** for professional growth/goal setting (brief examination of current status related to the needs of the site/position):

Agreement on Standard and Goal:
~~**Evaluator**~~ **Supervisor** _____ Date _____ ~~**Evaluatee**~~ **Employee** _____ Date _____

Mid-Year Conference Review: Results (looking back to examine growth, change, next steps):

~~**Evaluatee**~~ **Employee** _____ Date _____

San Juan Unified School District
~~**SJPEC Evaluation Reflection**~~
~~**Evaluation**~~ **Employee's Reflection Rubric and Comments**
(To be completed by the employee ~~member~~)
Page 4

Name _____

This page provides self-examination for performance. ~~**Evaluatee**~~ **Employee** should mark the rubric according to his/her own judgment of job performance according to the California Professional Standards for Educational Leaders (Page 2 of 5) and as related to the job description.

	PRACTICE:			
	Toward the standard	**Approaches the standard**	**Meets the standard**	**Exemplifies the standard**
Standard 1 Development and Implementation of a Shared Vision				
Standard 2 Instructional Leadership				
Standard 3 Management and Learning Environment				
Standard 4 Family and Community Engagement				
Standard 5 Ethics and Integrity				
Standard 6 External Context and Policy				

~~**Evaluatee's**~~ **Employee's** comments and evidence used:

~~**Evaluator**~~ **Supervisor** _____ Date _____

~~**Evaluatee**~~ **Employee** _____ Date _____

San Juan Unified School District
SJPEC ~~Evaluation~~ Employee's Reflection Rubric and Comments
~~Evaluator's Supervisor's Comments~~
Employee's Reflection Rubric and Comments
(To be completed by the Supervisor)
Page 5

Name _____

This page provides recognition for outstanding performance and observations of specific recommendations. It also serves to clarify areas of concern and provides a plan of support as needed. The **~~evaluator~~ supervisor** should mark the rubric according to his/her own judgment of job performance according to the California Professional Standards for Educational Leaders (Page 2 of 5) and as related to the job description. The **~~evaluator~~ supervisor** should describe the evidence used to arrive at the judgment of administrative performance.

	PRACTICE:			
	Toward the standard	**Approaches the standard**	**Meets the standard**	**Exemplifies the standard**
Standard 1 Development and Implementation of a Shared Vision				
Standard 2 Instructional Leadership				
Standard 3 Management and Learning Environment				
Standard 4 Family and Community Engagement				
Standard 5 Ethics and Integrity				
Standard 6 External Context and Policy				

~~Evaluator's~~ Supervisor's comments & evidence used:

_____ _____ _____ _____

~~Evaluator~~ Supervisor Date **~~Evaluatee~~ Employee** Date

*The **~~evaluatee's~~ employee's** signature does not constitute an agreement with the **~~evaluator's~~ supervisor's** comments or ratings, but is an acknowledgement that the document has been received. **~~Evaluatee's~~ Employees** have the right to submit an additional written response for inclusion in this report.*

San Juan Unified School District **APPENDIX "G"**

SJPEC Flex Day Protocol

Intent: The District and Coalition recognize that the responsibilities of administrators do not lend themselves to a defined workday or workweek of rigidly established length. The hours required will vary from day to day and week to week, however, the hours required of the administrator should be reasonable. The parties also agree that the relationship of the school to the community is a critical factor in the development of a sound educational program. The school principal has the prime responsibility for establishing that relationship. This includes: support of, and attendance at community special services clubs; organization of, and attendance at parent clubs/PTA meetings, and back-to-school and open house events.

Article 9.4 Flex Day: Employees in the Unit who, with the knowledge and concurrence of their supervisor, work on a day not part of their normal contract work year calendar, have the right to exchange that extra day for a work day that is part of their work year calendar ("flex day"). Every attempt shall be made to avoid scheduling a "flex day" when students or teachers are present or meetings are scheduled. **Flex days are not to be used for weekend school related functions or business unless the event is considered non-routine and your supervisor approves of the request.** The scheduling of such day shall be discussed with and subject to prior approval (see SJPEC Flex Day Protocol form, Appendix G) by the employee's supervisor.

NAME: _____

SCHOOL/DEPARTMENT: _____

TODAY'S DATE: _____

Day(s) requested off as a "flex day": _____

Day(s) requested *to be* worked outside of work year calendar: _____

- ***Must be a non-instructional workday for site administrators***

RATIONALE:

SIGNATURE: _____ **DATE:** _____

SUPERVISOR APPROVAL: _____ **DATE:** _____

1) **Approval must be secured prior to flexing workday(s)**
2) **Must be full day – no partial day requests**
3) **Must be returned to employee within 10 workdays**

Original –Supervisor **Copy – Employee** **Copy - HR**

SAN JUAN UNIFIED SCHOOL DISTRICT Certificated Supervisors' Salary Schedule (SJPEC) 2019 - 2020 School Year

SALARY RANGE	CLASS CODE	CLASSIFICATION	WORK YEAR	DAYS	A	B	C	D	E	F	CONTINUING EDUCATION
15	294 360 373 380	Program Specialist, English Learner and Multicultural Education Program Specialist, Health Services Program Specialist, K-12 Curriculum Program Specialist, Multilingual/Cultural Education	A-1	225	$89,567 398.08	$93,601 416.00	$97,808 434.70	$102,214 454.28	$106,808 474.70	$111,623 496.10	$117,763 523.39
	451	Program Specialist, Visual and Performing Arts	C-1	213	$84,789 398.08	$88,610 416.00	$92,590 434.70	$96,762 454.28	$101,112 474.70	$105,670 496.10	$111,484 523.39
16	437	Administrator, Early Childhood Education	A-1	225	$ 91,809 408.04	$ 95,943 426.41	$ 100,255 445.58	$ 104,769 465.64	$ 109,483 486.59	$ 114,419 508.53	$120,712 536.50
	450	Program Specialist, Pupil Personnel Services	A-2	225	$91,809 408.04	$95,943 426.41	$100,255 445.58	$104,769 465.64	$109,483 486.59	$114,419 508.53	$120,712 536.50
	219 359	Vice Principal, Elementary Program Specialist, Special Education	C-1	208	$84,874 408.04	$88,695 426.41	$92,681 445.58	$96,853 465.64	$101,211 486.59	$105,774 508.53	$111,591 536.50
	392	Psychologist	D-1	198	$80,791 408.04	$84,431 426.41	$88,224 445.58	$92,197 465.64	$96,351 486.59	$100,689 508.53	$106,227 536.50
17	222 226	Vice Principal, Middle School Vice Principal, Adult Education	C-1	208	$ 86,991 418.23	$ 90,909 437.06	$ 95,002 456.74	$ 99,276 477.29	$ 103,743 498.76	$ 108,419 521.25	$114,382 549.91
18	215	Administrator on Special Assignment	A-2	225	$ 96,460 428.71	$ 100,799 448.00	$ 105,331 468.14	$ 110,075 489.22	$ 115,023 511.21	$ 120,204 534.24	$126,816 563.63
	224	Vice Principal, High School	C-1	208	$ 89,170 428.71	$ 93,183 448.00	$ 97,372 468.14	$ 101,759 489.22	$ 106,334 511.21	$ 111,122 534.24	$117,234 563.63
19	1196	Program Administrator, Special Education	A-1	225	$ 98,869 439.42	$ 103,311 459.16	$ 107,943 479.75	$ 112,825 501.44	$ 117,898 523.99	$ 123,208 547.59	$129,985 577.71
	200 202	Principal, Adult Education Principal, Elementary	C-1	208	$91,398 439.42	$95,505 459.16	$99,787 479.75	$104,301 501.44	$108,989 523.99	$113,900 547.59	$120,164 577.71
21	206 214	Principal, Middle School Principal on Special Assignment	C-1	208	$ 96,022 461.64	$ 100,346 482.43	$ 104,863 504.15	$ 109,580 526.83	$ 112,868 542.63	$ 119,661 575.29	$126,242 606.93
22	211	Principal, Alternative Learning Center	A-2	225	$ 106,467 473.19	$ 111,258 494.48	$ 116,265 516.73	$ 122,077 542.56	$ 127,570 566.98	$ 133,311 592.49	$140,645 625.09
23	208	Principal, High School	A-2	225	$ 109,130 485.02	$ 114,048 506.88	$ 119,174 529.66	$ 124,537 553.50	$ 130,142 578.41	$ 136,003 604.46	$143,484 637.71

ANNIVERSARY/LONGEVITY INCREMENT

For credit toward any anniversary increment, a manager must have worked 75% of each school year.

1. Two percent (2%) of the base salary after 14 years of completed service in the San Juan Unified School District.
2. Four percent (4%) of the base salary after 17 years of completed service in the San Juan Unified School District (the 4% includes the 14 year increment).
3. Eight percent (8%) of the base salary after 19 years of completed services in the San Juan Unified School District (the 8% includes the 14 year and 17 year increments).

EXTRA ASSIGNMENT RATE

$62.18 / hour

Board Approval Date: January 28, 2020

SAN JUAN UNIFIED SCHOOL DISTRICT

Short Term, Temporary Salary Schedule

2019 - 2020 School Year

CLASSIFICATION	SALARY RATE
GENERAL	
Accompanist/Conductor/Clinician*****	$25.30/hr
~~**Administrator (hourly extra assignment) (1)**~~	~~**$35.00/hr**~~
Administrator (full day, substitute administrator; retirees and nonemployees only) (2)	350-450/ day
Bilingual Student Teacher	4000.00/semester
Classified Substitutes	Step 1 of Appropriate Range
Counselor Intern I	***12.00/hr
Counselor Intern II	****20.00/hr
Instructor	***12.00/hr
Intramural Official Intermediate	21.00/game
Project Parent Liaison	***12.00/hr to maximum of 1015.00/semester
School Psychologist Intern I	***12.00/hr
School Psychologist Intern II	13.50/hr
School Psychologist Intern III	16.75/hr
Senior Instructor	15.00/hr
Special Events Leader I	***12.00/hr
Special Events Leader II	25.30/hr**
STRS Counselor	24.20/hr
Student	***12.00/hr
Work Experience Intern	***12.00/hr
OUTDOOR EDUCATION	
Camp Winthers Program Coordinator	$240.00/day
Program Leader	400.00/wk
Resource Counselor	175.00/wk
Resource Instructor	300.00/wk
Resource Instructor - Water Sports	225.00/wk
Tent Counselor	125.00/wk
COACHING AND EXTRACURRICULAR ASSIGNMENTS 1/	
Varsity Coach *	$2,693/season**
Assistant Coach *	2,154/season**
Drill Team *	2,072/yr**
Cheer Leaders *	2,072/yr**
Other Athletic or Extra-curricular stipend-based assignments*	Per Stipend Schedule
Announcer, Scorekeeper, Timekeeper, Ticket Taker	***12.00/hr
Ticket Seller	13.00/hr

1/ Per Board Policy 4127: Can only hire noncertificated individual after annual search fails to identify certificated staff member to perform coaching duties.

(1) Extra assignment for work not part of regular work assignment (i.e. serving on an interview panel);

(2) VP $350/day; Principal $400/day; long term 40+ days or 30+ days when opening/closing school-add'l $50/day.

For current employees serving in an acting capacity, see Management Special Assignment Salary Schedule.

* Compensation rate tied to certificated special additional assignment/stipend rates and subject to change based on those rates.

*** Minimum wage change to $12.00/hr effective January 1, 2019: Board Approved 11/14/2017

*****Added position and wage rate: Board Approved 8/22/17

** Effective January 1, 2019

SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION

AGENDA ITEM: I-3 (c)

MEETING DATE: 01/28/2020

SUBJECT: Tentative Agreement with the San Juan Supervisors Association and the San Juan Unified School District for 2019-2020 and 2020-2021

CHECK ONE:
For Discussion: ☐
For Action: ☒
Report: ☐
Workshop: ☐
Recognition: ☐
Emergency Action: ☐

DEPARTMENT: Schools and Labor Relations

ACTION REQUESTED:
The superintendent is recommending that the board approve the San Juan Supervisors Association tentative agreement.

RATIONALE/BACKGROUND:
The district shall provide a one-time, off-schedule payment equal to 2.00% of each member's base salary (Exhibit B) for the full or partial period between 07/01/2019 to 06/30/2020. The one-time, off-schedule payment will be paid within 60 days of board ratification. This one-time, off-schedule payment will not increase base compensation for the 2019-2020 fiscal year.

This tentative agreement was ratified by the San Juan Supervisors Association on November 22, 2019.

ATTACHMENTS:
A: Tentative Agreement
B: AB1200 Public Disclosure of Collective Bargaining Agreement [see item I-3(a)]

PREVIOUS STAFF/BOARD ACTION:
Superintendent's Cabinet: 11/11/2019, 11/18/2019
Board of Education: 01/14/2020

FISCAL IMPACT:
Current Budget: See attached AB 1200 document
Additional Budget: N/A
Funding Source: N/A
(Unrestricted Base, Supplemental, other restricted, etc.)
Current Year Only ☐ Ongoing: ☐

LCAP/STRATEGIC PLAN:
Goal: N/A Focus: N/A
Action: N/A

Strategic Plan: N/A

FINANCIAL DATA:
In accordance with AB 1200 (Chapter 1213/1991); GC 3547.5; and CCR, Title V, Section 15449, Fiscal Services has prepared an analysis of the fiscal impact of the proposed agreement and has submitted it to the Sacramento County Office of Education *[reference agenda item I-3(a), attachment B: AB 1200 Public Disclosure of Collective Bargaining Agreement]*. Costs to the general fund for the San Juan Supervisors Association tentative collective bargaining agreement are: an increase of $29,154 in 2019-2020 and a decrease of ($29,154) in 2020-2021.

PREPARED BY: Jim Shoemake, Assistant Superintendent, Schools and Labor Relations

APPROVED BY: Kent Kern, Superintendent of Schools

Tentative Agreement
Between
San Juan Unified School District (District)
and the
San Juan Supervisors Association (SJSA)

Article 5 - Salary

The District shall provide a one-time off schedule payment equal to 2.00% of each member's base salary (Exhibit B) for the full or partial period between 07/01/19 to 06/30/20. The one-time off schedule payment will be paid within 60 days of board ratification. This one-time off schedule payment will not increase base compensation for the 2019-20 fiscal year.

Article 1 - Term

1.06.1 Two (2) year contract for the years 2019-20 and 2020-21

1.06.3 The parties agree to reopen negotiations for the 2020-21 school year. The following will be considered reopeners: Article 5 (Salary) and Article 9 (Fringe Benefits). Unless by mutual agreement, no other Articles will be reopened for the 2020-21 school year.

Article 6 - Fringe Benefits

6.1.2.2 If an employee wishes to enroll in the District sponsored buy up vision plan, which permits coverage for eligible dependents, the employee will be responsible for paying the full cost of this coverage for their dependents, as well as any additional premium for their own buy up plan coverage.

11/13/19

Jim Shoemake
Assistant Superintendent
Schools and Labor Relations
San Juan Unified School District

Date

11/13/19

Cherie Chenoweith
President
San Juan Supervisors Association

Date

SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION

AGENDA ITEM: I-3 (d)

MEETING DATE: 01/28/2020

SUBJECT: Tentative Agreement with Teamsters Local No. 150 and the San Juan Unified School District for 2019-2020 and 2020-2021

DEPARTMENT: Schools and Labor Relations

CHECK ONE:
For Discussion: ☐
For Action: ☒
Report: ☐
Workshop: ☐
Recognition: ☐
Emergency Action: ☐

ACTION REQUESTED:
The superintendent is recommending that the board approve the Teamsters Local No. 150 tentative agreement.

RATIONALE/BACKGROUND:
The district shall provide a one-time, off-schedule payment equal to 2.00% of each member's base salary (Transportation salary schedule) and the shift differential (Article 6.1.2) for the full or partial period between 07/01/2019 to 06/30/2020. The one-time, off-schedule payment will be paid within 60 days of board ratification. This one-time, off-schedule payment will not increase base compensation for the 2019-2020 fiscal year.

This tentative agreement was ratified by the Teamsters Local No. 150 on January 9, 2020.

ATTACHMENTS:
A: Tentative Agreement
B: AB 1200 Public Disclosure of Collective Bargaining Agreement [see item I-3(a)]

PREVIOUS STAFF/BOARD ACTION:
Superintendent's Cabinet: 01/06/2020
Board of Education: 01/14/2020

FISCAL IMPACT:
Current Budget: See attached AB 1200 document
Additional Budget: N/A
Funding Source: N/A
(Unrestricted Base, Supplemental, other restricted, etc.)
Current Year Only ☐ Ongoing: ☐

LCAP/STRATEGIC PLAN:
Goal: N/A Focus: N/A
Action: N/A

Strategic Plan: N/A

FINANCIAL DATA:
In accordance with AB 1200 (Chapter 1213/1991); GC 3547.5; and CCR, Title V, Section 15449, Fiscal Services has prepared an analysis of the fiscal impact of the proposed agreement and has submitted it to the Sacramento County Office of Education *[reference agenda item I-3(a), attachment B: AB 1200 Public Disclosure of Collective Bargaining Agreement]*. Costs to the general fund for the Teamsters Local No. 150 tentative collective bargaining agreement are: an increase of $129,990 in 2019-2020 and a decrease of ($129,990) in 2020-2021.

PREPARED BY: Jim Shoemake, Assistant Superintendent, Schools and Labor Relations

APPROVED BY: Kent Kern, Superintendent of Schools

Tentative Agreement
Between
San Juan Unified School District (District)
and the
Teamsters Local No. 150 (Teamsters)

Article 6 - Salary

The District shall provide a one-time off schedule payment equal to 2.00% of each member's base salary (Transportation Salary Schedule) and the shift differential (Article 6.1.2) for the full or partial period between 07/01/19 to 06/30/20. The one-time off schedule payment will be paid within 60 days of board ratification. This one-time off schedule payment will not increase base compensation for the 2019-20 fiscal year.

Article 1 - Term

1.06.1 Two (2) year contract for the years 2019-20 and 2020-21

1.06.3 The parties agree to reopen negotiations for the 2020-21 school year. The following will be considered reopeners: Article 6 (Salary) and Article 7 (Fringe Benefits). Unless by mutual agreement, no other Articles will be reopened for the 2020-21 school year.

Article 7 - Fringe Benefits

7.1.3.a If an employee wishes to enroll in the District sponsored buy up vision plan, which permits coverage for eligible dependents, the employee will be responsible for paying the full cost of this coverage for their dependents, as well as any additional premium for their own buy up plan coverage.

12/17/19

Jim Shoemake — Date
Assistant Superintendent
Schools and Labor Relations
San Juan Unified School District

12-17-19

Nancy Jones — Date
Business Representative
Teamsters Local No. 150

12/17/19

Alan Daurie — Date
Business Agent
Teamsters Local No. 150

SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION

AGENDA ITEM: I-4 (a)

MEETING DATE: 01/28/2020

SUBJECT: One-time, Off-schedule Payment for the San Juan Administrators Association and Cabinet Members

DEPARTMENT: Schools and Labor Relations

CHECK ONE:
For Discussion: ☐
For Action: ☒
Report: ☐
Workshop: ☐
Recognition: ☐
Emergency Action: ☐

ACTION REQUESTED:
The superintendent is recommending that the board approve the one-time, off-schedule payment for the San Juan Administrators Association and Cabinet as outlined in the language below for 2019-2020.

RATIONALE/BACKGROUND:
The district shall provide a one-time, off-schedule payment equal to 2.00% of each member's base salary for the full or partial period between 07/01/2019 to 06/30/2020. The one-time, off-schedule payment will be paid within 60 days of board ratification. This one-time, off-schedule payment will not increase base compensation for the 2019-2020 fiscal year.

ATTACHMENTS:
AB 1200 Public Disclosure of Collective Bargaining Agreement [see item I-3(a)]

PREVIOUS STAFF/BOARD ACTION:
Superintendent's Cabinet: 11/18/2019
Board of Education: 01/14/2020

FISCAL IMPACT:
Current Budget: See attached AB 1200 document
Additional Budget: N/A
Funding Source: N/A
(Unrestricted Base, Supplemental, other restricted, etc.)
Current Year Only ☐ Ongoing: ☐

LCAP/STRATEGIC PLAN:
Goal: N/A Focus: N/A
Action: N/A

Strategic Plan: N/A

FINANCIAL DATA:
A cost analysis, pursuant to AB 1200 (Chapter 1213/1991); GC 3547.5; and CCR, Title V, Section 15449 has been prepared by Fiscal Services and submitted to the Sacramento County Office of Education *[reference agenda item I-3(a), attachment B: AB 1200 Public Disclosure of Collective Bargaining Agreement]*. Costs to the general fund for the San Juan Administrators Association and Cabinet members' salary schedule adjustments are: an increase of $203,731 for 2019-2020 and a decrease of ($203,731) for 2020-2021.

PREPARED BY: Jim Shoemake, Assistant Superintendent of Schools and Labor Relations

APPROVED BY: Kent Kern, Superintendent of Schools

SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION

AGENDA ITEM: I-4 (b)

MEETING DATE: 01/28/2020

SUBJECT: One-time, Off-schedule Payment for the Confidential Group and Unrepresented Specialists

DEPARTMENT: Schools and Labor Relations

CHECK ONE:
For Discussion: ☐
For Action: ☒
Report: ☐
Workshop: ☐
Recognition: ☐
Emergency Action: ☐

ACTION REQUESTED:
The superintendent is recommending that the board approve the one-time, off-schedule payment for the Confidential Group and Unrepresented Specialists as outlined in the language below for 2019-2020.

RATIONALE/BACKGROUND:
The district shall provide a one-time off schedule payment equal to 2.00% of each member's base salary for the full or partial period between 07/01/2019 to 06/30/2020. The one-time off schedule payment will be paid within 60 days of board ratification. This one-time off schedule payment will not increase base compensation for the 2019-2020 fiscal year.

ATTACHMENT(S):
AB 1200 Public Disclosure of Collective Bargaining Agreement [see item I-3(a)]

PREVIOUS STAFF/BOARD ACTION:
Superintendent's Cabinet: 11/18/2019
Board of Education: 01/14/2020

FISCAL IMPACT:
Current Budget: See attached AB 1200 document
Additional Budget: N/A
Funding Source: N/A
(Unrestricted Base, Supplemental, other restricted, etc.)
Current Year Only ☐ On-going: ☐

LCAP/STRATEGIC PLAN:
Goal: N/A Focus: N/A
Action: N/A

Strategic Plan: N/A

FINANCIAL DATA:
A cost analysis, pursuant to AB 1200 (Chapter 1213/1991); GC 3547.5; and CCR, Title V, Section 15449, has been prepared by Fiscal Services and submitted to the Sacramento County Office of Education *[reference agenda item I-3(a), attachment B: AB 1200 Public Disclosure of Collective Bargaining Agreement]*. Costs to the general fund for the Confidential Group and Unrepresented Specialists' salary schedule adjustments are: an increase of $99,815 for 2019-2020 and a decrease of ($99,815) for 2020-2021.

PREPARED BY: Jim Shoemake, Assistant Superintendent of Schools and Labor Relations

APPROVED BY: Kent Kern, Superintendent of Schools

SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION

AGENDA ITEM: I-5

MEETING DATE: 01/28/2020

SUBJECT: PARS Supplementary Retirement Plan

CHECK ONE:

For Discussion:	☐
For Action:	☒
Report:	☐
Workshop:	☐
Recognition:	☐
Emergency Action:	☐

DEPARTMENT: Human Resources

ACTION REQUESTED:
The superintendent is recommending that the board adopt Resolution No. 2970 approving the Public Agency Retirement Services (PARS) supplementary retirement plan for certificated non-management, certificated management, classified non-management, classified management and confidential employees.

RATIONALE/BACKGROUND:
The district has worked with PARS to conduct an analysis of a potential supplementary retirement plan, an early retirement incentive program, for the 2019-2020 school year.

At this time, the PARS supplementary retirement plan will be offered to certificated non-management, certificated management, classified non-management, classified management and confidential employees as part of the district retirement program, effective January 28, 2020. The retirement incentive must meet the district's fiscal and operational objectives in order for the plan to go into effect. If these goals are not reached, the district may withdraw the retirement incentive. If the district withdraws the retirement incentive, resignations may be rescinded.

ATTACHMENT(S):
A: Resolution No. 2970

BOARD COMMITTEE ACTION/COMMENT:
N/A

PREVIOUS STAFF/BOARD ACTION:
Superintendent's Cabinet: 01/21/2020

FISCAL IMPACT:
Current Budget: $ N/A
Additional Budget: $ N/A
Funding Source: N/A
(Unrestricted Base, Supplemental, other restricted, etc.)
Current Year Only: ☐ On-going: ☐

LCAP/STRATEGIC PLAN:
Goal: N/A
Focus: N/A
Action: N/A
Strategic Plan: N/A

PREPARED BY: Paul Oropallo, Assistant Superintendent, Human Resources

APPROVED BY: Kent Kern, Superintendent of Schools

SAN JUAN UNIFIED SCHOOL DISTRICT

PARS Supplementary Retirement Plan for
Certificated Non-Management, Certificated Management, Classified Non-Management,
Classified Management and Confidential Employees

BOARD RESOLUTION No. 2970

WHEREAS it is determined to be in the best fiscal interest of the San Juan Unified School District and its employees to provide a retirement incentive offer to eligible employees who wish to voluntarily exercise their option to separate from district service;

WHEREAS there is no cash option available to employees in lieu of this retirement incentive offer;

WHEREAS Public Agency Retirement Services (PARS) has made available to the district a supplementary retirement plan, a retirement incentive program supplementing STRS/PERS, and qualifying under the relevant sections of Section 403(b) of the Internal Revenue Code;

WHEREAS the district, pursuant to applicable policy and/or a collective bargaining agreement, desires to adopt the supplementary retirement plan and to fund the incentive through nonelective employer, post-employment contributions to the PARS designated 403(b) provider.

NOW THEREFORE, BE IT RESOLVED THAT:

1. The governing board hereby adopts the PARS supplementary retirement plan for certificated non-management, certificated management, classified non-management, classified management and confidential employees, as part of the district retirement program, effective January 28, 2020; and

2. The retirement incentive must meet the district's fiscal and operational objectives in order for the plan to go into effect. If these goals are not reached, the district may withdraw the retirement incentive. If the district withdraws the retirement incentive, resignations may be rescinded; and

3. The Board of Education hereby appoints the assistant superintendent of Human Resources, or his/her successor or his/her designee as the district's plan administrator; and

4. The district's PARS plan administrator is hereby authorized to execute the contracts, custodial agreement facilitating the payment of contributions to the 403(b) arrangement, and other legal documents related to a trust or the plan on behalf of the district and to take whatever additional actions are necessary to maintain the district's participation in the plan and to maintain compliance of any relevant regulations issued.

AYES:
NOES:
ABSENT:
ABSTAIN:

STATE OF CALIFORNIA
COUNTY OF SACRAMENTO
The clerk and secretary of the Board of Education of the San Juan Unified School District of Sacramento County, California, hereby certifies that the above foregoing resolution was duly and regularly adopted by said district at a regular meeting thereof held on January 28, 2020, and passed by a_____vote.

_____ _____
Zima Creason, Clerk Kent Kern, Secretary

SAN JUAN UNIFIED SCHOOL DISTRICT
TENTATIVE BOARD AGENDA ITEMS
2019-2020

FEBRUARY 11

Continuous Improvement Series: English Language Learners – R	Calvin
*Annual Policy Review [Discussed 01/28/20] – A	Simlick
BP 3430 Investing and Debt Management	
BP 5116.1 Intradistrict Open Enrollment	
BP 6145 Extracurricular/Cocurricular Activities	
BP 6020 Parent Involvement and Family Engagement	
*Mira Loma Out of Country Fieldtrip (Japan) – A	Messer
*Strategic Framework – A	Schnepp
*Audit Report for Measures J, N, P and S – A	Stephens

FEBRUARY 25

WORKSHOP: West End Middle School Development – D	Allen
Recognition: Arts Education Month (March) – A	Townsend
Family and Community Engagement program and services update – R	Allen
Recommendation for Reductions in PKS & Criteria for Tie Break (Certificated TK-12) – D	Oropallo
Recommendation for Reducing/Discontinuing CCS & Criteria for Tie Break (Certificated ECE) – D	Oropallo
Notice of Intent to Reduce Classified Positions – D	Oropallo
2020 CSBA Delegate Assembly Election – A	Board
*Consolidated Application, Winter Report 2019-20 – A	Calvin

MARCH 10

WORKSHOP: Title I and Site Allocations – D	Calvin
Second Interim Budget Report – R	Stephens
Resolutions: Reductions in PKS & Criteria for Tie Break (Certificated TK-12) [Discussed 02/25/20] – A	Oropallo
Resolution: Reducing/Eliminating CCS & Criteria for Tie Break (Certificated ECE) [Discussed 02/25/20] – A	Oropallo
Resolution: Notice of Intent to Reduce Classified Positions [Discussed 02/25/20] – A	Oropallo
*Resolution: School Board Election Order – A	Kern

MARCH 24

Recognition: Week of the Young Child (Apr. 13-17) – A	Townsend
Continuous Improvement Series: Early Learning – R	Townsend
LCAP Design Update – R	Schnepp
*Head Start and Early Head Start Grant Application 2020-2021 – A	Townsend

APRIL 14

Recognition: School Bus Driver's Appreciation Day (Apr. 28) – A	Oropallo
New Course Adoptions – D	Schnepp
Instructional Materials Adoptions – D	Schnepp
Williams Complaint – R	Simlick
Proposed Board Meeting Dates for 2020-2021 – A	Kern

APRIL 28

Recognition: California Day of the Teacher (May 13) – A	Oropallo
Recognition: National Nurses Week and National School Nurse Day (May 6-12 & May 13) – A	Calvin
Technology Update – R	Skibitzki
New Course Adoptions [Discussed 04/14/20] – A	Schnepp
Instructional Materials Adoptions [Discussed 04/14/20] – A	Schnepp
School Climate: Parent-Staff-Student Voice – R	Schnepp

MAY 12

Recognition: Classified School Employee Week (May 17-23) – A	Oropallo
Hearing Officer's Recommendation-2020 RIF (if applicable) – A	Simlick
*Approval of CTE 2020 Advisory Committee Roster – A	Messer

MAY 26

Recognition: National Science Bowl (if applicable) – A	Messer/Shoemake
Recognition: Science Olympiad (if applicable) – A	Messer/Shoemake
Recognition: Academic Decathlon (if applicable) – A	Messer
Continuous Improvement Series: Special Education – R	Calvin
Standards Implementation Update – R	Schnepp
*Head Start/Early Head Start Contract Resolution FY 2020-2021 – A	Townsend

JUNE 9

Public Hearing: LCAP – D	Schnepp
LCAP ESSA Federal Addendum – D	Calvin
Public Hearing: LCAP/Choices Charter School – D	Flagler
Public Hearing: Presentation of the 2020-2021 Budget – D	Stephens
*CIF Superintendent Designation of Representatives 2020-2021 – A	Messer
*Charter School 2018-2019 Audit Reports (Aspire, Atkinson, CMP, GIS, GV, OFY) – A	Stephens

JUNE 23

LCAP [Public Hearing 06/09/20] – A	Schnepp
LCAP ESSA Federal Addendum [Discussed 06/09/20] – A	Calvin
LCAP/Choices Charter School [Public Hearing 06/09/20] – A	Flagler
Adoption of the 2020-2021 Budget [Public Hearing 06/09/20] – A	Stephens
Temporary Interfund Borrowing of Cash – A	Stephens
*Consolidated Application, Spring Report 2019-2020 – A	Calvin
*2019-2020 Actuarial Report (OPEB) – A	Oropallo

D=discussion; A=action; *=consent; R=report; PC=public comment