

# **EXHIBIT A**

**May 9, 2018**

I. Purchase Orders	\$	181,017.02
II. Consultant Contracts (not to exceed \$500 each)	\$	0.00
III. Miscellaneous Contracts	\$	0.00
IV. Commercial Warrants	\$	1,551,401.07
V. Revolving Cash Fund Business I (Month ending April 30, 2018)	\$	248.30
VI. Revolving Cash Fund Business II (Month ending April 30, 2018)	\$	3.00
VII. Purchasing Card Expenses March 2018	\$	14,914.71



Report ID: POX4010  
 User ID: 141612  
 Run Control: POX4010

PeopleSoft Purchasing  
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PO Dates Included : 03/27/2018 Thru: 04/20/2018  
 Business Unit: 02300

PO Date	PO ID	Contract ID	Rel	Change Order	Buyer	Supplier Id	Name	PO Status	Hold	Rcv	Curr	Amount
03/27/2018	0000003685		0	0	Adriana Orendain	UN0500	UNION-TRIBUNE PUBLISHING	Dispatched	N	R	USD	5,298.62
03/28/2018	0000003686		0	0	Michelle Mendoza Flores	MI1030	MIRACLE PLAYGROUND SALES	Dispatched	N	N	USD	3,000.00
03/30/2018	0000003687		0	0	Jennifer Sandoval	HA0080	HANDWRITING WITHOUT TEARS	Dispatched	N	R	USD	420.00
03/30/2018	0000003688		0	0	Jennifer Sandoval	OF0075	OFFICE DEPOT	Dispatched	N	R	USD	88.54
03/30/2018	0000003689		0	0	Jennifer Sandoval	OR0090	Orange County Department of Education	Dispatched	N	N	USD	275.00
03/30/2018	0000003690		0	0	Jennifer Sandoval	AM0100	AMAZON.COM	Dispatched	N	P	USD	33.94
04/02/2018	0000003691		0	0	Jennifer Sandoval	OF0075	OFFICE DEPOT	Dispatched	N	R	USD	427.95
04/02/2018	0000003692		0	0	Lino Garcia	SC0875	SCHOOL SPECIALTY	Dispatched	N	N	USD	2,583.36
04/02/2018	0000003693		0	0	Lino Garcia	SC0805	SCHOOL HEALTH CORP.	Dispatched	N	R	USD	1,834.56
04/02/2018	0000003694		0	0	Lino Garcia	XP0200	Veritiv Operating Company	Dispatched	N	R	USD	379.50
04/02/2018	0000003695		0	0	Michelle Mendoza Flores	DE0220	KING BUSINESS SERVICES, INC.	Dispatched	N	N	USD	5,000.00
04/02/2018	0000003696		0	0	Michelle Mendoza Flores	SO0100	THE SOCO GROUP, INC.	Dispatched	N	N	USD	3,500.00
04/03/2018	0000003697		0	0	Jennifer Sandoval	AM0100	AMAZON.COM	Dispatched	N	R	USD	36.08
04/03/2018	0000003698		0	0	Lino Garcia	NO0600	NORTHSTAR AV LLC	Dispatched	N	N	USD	1,633.00
04/03/2018	0000003700		0	0	Michelle Mendoza Flores	MA0100	Maintex	Dispatched	N	N	USD	1,000.00
04/03/2018	0000003702		0	0	Lino Garcia	SO2075	SOUTHWEST SCHOOL&OFFICE SUPPLY	Dispatched	N	R	USD	251.40



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 Business Unit: 02300

PO Date	PO ID	Contract ID	Rel	Change Order	Buyer	Supplier Id	Name	PO Status	Hold	Rcv	Curr	Amount
04/03/2018	0000003703		0	0	Lino Garcia	OF0075	OFFICE DEPOT	Dispatched	N	R	USD	114.00
04/03/2018	0000003704		0	0	Lino Garcia	BE1545	BEST WAY PRINTING	Dispatched	N	N	USD	1,347.00
04/03/2018	0000003705		0	0	Lino Garcia	ST0160	STANDARD STATIONARY SUPPLY CO	Dispatched	N	N	USD	221.40
04/03/2018	0000003706		0	0	Michelle Mendoza Flores	HO0350	THE HOME DEPOT	Dispatched	N	N	USD	597.30
04/03/2018	0000003707		0	1	Michelle Mendoza Flores	WI0475	WILLY'S ELECTRONIC SUPPLY CO	Dispatched	N	N	USD	1,000.00
04/04/2018	0000003709		0	0	Jennifer Sandoval	ST0585	STAPLES BUSINESS ADVANTAGE	Dispatched	N	R	USD	264.76
04/04/2018	0000003710		0	0	Jennifer Sandoval	CA1330	CALIFORNIA ASSOCIATION OF SUPERVISORS OF	Dispatched	N	N	USD	750.00
04/04/2018	0000003711		0	0	Jennifer Sandoval	LA0500	LAKESHORE LEARNING MATERIALS	Dispatched	N	R	USD	479.00
04/04/2018	0000003712		0	0	Jennifer Sandoval	AM0100	AMAZON.COM	Dispatched	N	R	USD	34.78
04/04/2018	0000003713		0	0	Jennifer Sandoval	SC0304	SCHOLASTIC BOOK CLUBS	Dispatched	N	N	USD	250.00
04/04/2018	0000003714		0	0	Jennifer Sandoval	AM0100	AMAZON.COM	Dispatched	N	R	USD	14.99
04/04/2018	0000003716		0	0	Jennifer Sandoval	LA0500	LAKESHORE LEARNING MATERIALS	Dispatched	N	N	USD	99.50
04/05/2018	0000003717		0	0	Michelle Mendoza Flores	SH0300	SHERWIN-WILLIAMS - STORE 8171	Dispatched	N	N	USD	2,000.00
04/05/2018	0000003718		0	0	Michelle Mendoza Flores	EW0100	EWING	Dispatched	N	N	USD	500.00
04/05/2018	0000003719		0	0	Michelle Mendoza Flores	DI0600	DIXIELINE LUMBER & HOME CENTER	Dispatched	N	N	USD	3,000.00
04/05/2018	0000003720		0	0	Michelle Mendoza Flores	RI0020	RCOM RADIO LLC	Dispatched	N	N	USD	11,165.00
04/05/2018	0000003721		0	0	Michelle Mendoza Flores	WA1175	WAXIE SANITARY SUPPLY	Dispatched	N	N	USD	30,000.00



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PO Dates Included : 03/27/2018 Thru: 04/20/2018  
 Business Unit: 02300

PO Date	PO ID	Contract ID	Rel	Change Order	Buyer	Supplier Id	Name	PO Status	Hold	Rcv	Curr	Amount
04/06/2018	0000003722		0	0	Jennifer Sandoval	OF0075	OFFICE DEPOT	Dispatched	N	P	USD	717.40
04/06/2018	0000003723		0	0	Jennifer Sandoval	FO0301	FOLLETT LIBRARY RESOURCES	Dispatched	N	N	USD	1,461.71
04/09/2018	0000003724		0	0	Lino Garcia	OF0075	OFFICE DEPOT	Dispatched	N	R	USD	23,520.00
04/09/2018	0000003725		0	0	Jennifer Sandoval	TO0111	TOSHIBA BUSINESS SOLUTIONS	Dispatched	N	N	USD	4,500.00
04/09/2018	0000003726		0	0	Jennifer Sandoval	ST0585	STAPLES BUSINESS ADVANTAGE	Dispatched	N	R	USD	292.32
04/09/2018	0000003727		0	0	Jennifer Sandoval	AM0100	AMAZON.COM	Dispatched	N	P	USD	681.37
04/09/2018	0000003728		0	0	Jennifer Sandoval	ST0585	STAPLES BUSINESS ADVANTAGE	Dispatched	N	R	USD	129.99
04/09/2018	0000003729		0	0	Jennifer Sandoval	AM0100	AMAZON.COM	Dispatched	N	P	USD	721.73
04/09/2018	0000003730		0	0	Jennifer Sandoval	AM0100	AMAZON.COM	Dispatched	N	P	USD	475.70
04/09/2018	0000003732		0	0	Jennifer Sandoval	NO0450	MICRO FOCUS SOFTWARE INC.	Dispatched	N	N	USD	31,014.00
04/09/2018	0000003733		0	0	Jennifer Sandoval	GO0550	GOPHER SPORT	Dispatched	N	N	USD	661.40
04/09/2018	0000003734		0	0	Jennifer Sandoval	GO0550	GOPHER SPORT	Dispatched	N	N	USD	661.40
04/09/2018	0000003735		0	0	Jennifer Sandoval	ST0585	STAPLES BUSINESS ADVANTAGE	Dispatched	N	R	USD	230.98
04/10/2018	0000003736		0	0	Jennifer Sandoval	ST0585	STAPLES BUSINESS ADVANTAGE	Dispatched	N	R	USD	113.35
04/10/2018	0000003737		0	0	Adriana Orendain	CO1317	CDW	Dispatched	N	N	USD	124.40
04/10/2018	0000003738		0	0	Michelle Mendoza Flores	HO0350	THE HOME DEPOT	Dispatched	N	N	USD	335.21
04/10/2018	0000003739		0	0	Lino Garcia	SO2075	SOUTHWEST SCHOOL&OFFICE SUPPLY	Dispatched	N	R	USD	1,631.00



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PO Dates Included : 03/27/2018 Thru: 04/20/2018  
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PO Date	PO ID	Contract ID	Rel	Change Order	Buyer	Supplier Id	Name	PO Status	Hold	Rcv	Curr	Amount
04/13/2018	0000003740		0	0	Michelle Mendoza Flores	HU0500	HUNTER'S NURSERY, INC.	Dispatched	N	N	USD	1,000.00
04/13/2018	0000003741		0	0	Michelle Mendoza Flores	KB0100	KB13 VENTURES INC.	Dispatched	N	N	USD	12,030.00
04/13/2018	0000003742		0	0	Adriana Orendain	DA0110	D'Amico Printing & Graphics, Inc.	Dispatched	N	N	USD	62.00
04/17/2018	0000003744		0	0	Jennifer Sandoval	KE0100	KELLY PAPER	Dispatched	N	N	USD	115.56
04/17/2018	0000003745		0	0	Michelle Mendoza Flores	WE1390	WESTERN ENVIRONMENTAL & SAFETY	Dispatched	N	N	USD	1,482.50
04/17/2018	0000003746		0	0	Jennifer Sandoval	CO0110	COMMERCIAL GAS APPLIANCE	Dispatched	N	N	USD	135.00
04/18/2018	0000003748		0	0	Jennifer Sandoval	CO1317	CDW	Dispatched	N	N	USD	1,064.42
04/18/2018	0000003749		0	0	Adriana Orendain	AD0710	ADVANCED CLASSROOM TECHNOLOGIE	Dispatched	N	N	USD	3,120.00
04/18/2018	0000003751		0	2	Michelle Mendoza Flores	ST0100	STANDARD ELECTRONICS	Dispatched	N	N	USD	14,751.00
04/18/2018	0000003752		0	0	Jennifer Sandoval	VO0300	VOYAGER SOPRIS LEARNING	Dispatched	N	N	USD	1,430.00
04/18/2018	0000003754		0	0	Jennifer Sandoval	DE0700	DEMCO, INC.	Dispatched	N	N	USD	64.90
04/19/2018	0000003768		0	0	Jennifer Sandoval	CA0602	CASBO	Dispatched	N	N	USD	890.00

**CONSULTANT CONTRACTS**  
**Under \$500**

None

**MISCELLANEOUS CONTRACTS**

None

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**02300: National School District**

**2018-03-26**

Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	Py
KB0100 - KB13 VENTURES INC.	14383652	6,000.00	20782	6,000.00	0000003621	6,000.00	0100	0000644	0000	8100	5600150	056		
PR0050 - PRACTICAL, INC.	14383653	365.81	CT1294340255	365.81		365.81	0100	5640568	0000	3140	5800490	022		
ST0585 - STAPLES BUSINESS ADVANTAGE	14383654	361.63	3371393597	93.04	0000003532	93.04	0100	0000460	0000	2700	4300000	700		
ST0585 - STAPLES BUSINESS ADVANTAGE	14383654	361.63	3371393598	268.59	0000003562	268.59	0100	0980000	1110	1000	4300000	700		

Business Unit Total: \$6,727.44

<b>0100</b>	<b>\$6,727.44</b>
<b>TOTAL:</b>	<b>\$6,727.44</b>



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02300: National School District

2018-03-27

Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
0000000025 - Irma Gutierrez	14384234	15.17	IG031218	15.17		15.17	0100	0982000	0000	3600	4300000	038		
0000000027 - Saul Poblano	14384235	36.49	SLP031218	36.49		36.49	0100	0982000	0000	3600	4300000	038		
0000000136 - San Diego County Dental FBC	14384236	210.64	FBC Dental 0318- Classified	210.64		210.64	0100	0000000			9910099			
0000000136 - San Diego County Dental FBC	14384237	1,500.83	FBC Dental 0318- Certified	1,500.83		1,500.83	0100	0000000			9910099			
0000000137 - San Diego County VSP FBC	14384238	13.33	VSP FBC 0318- Classified	13.33		13.33	0100	0000000			9910099			
0000000137 - San Diego County VSP FBC	14384239	106.64	VSP FBC 0318- Certificate d	106.64		106.64	0100	0000000			9910099			
0000000192 - Maria Garcia	14384240	14.99	MG030918	14.99		14.99	0100	0982000	0000	3600	4300000	038		
DA0110 - D'Amico Printing & Graphics, Inc.	14384241	78.30	14985	78.30	0000003535	7.61	0100	0000615	0000	7100	4300000	010		
DA0110 - D'Amico Printing & Graphics, Inc.	14384241	78.30	14985	78.30	0000003535	70.69	0100	0000615	0000	7100	4300000	010		
EX0310 - EXPRESS PIPE & SUPPLY CO, INC	14384242	98.95	S103809813001	98.95	0000003585	98.95	0100	0000660	0000	8100	4300000	057		
HA1525 - HAWTHORNE POWER SYSTEMS	14384243	860.36	SS100110454	166.50	0000002441	166.50	0100	0982000	0000	3600	4400000	038		
HA1525 - HAWTHORNE POWER SYSTEMS	14384243	860.36	SS100110455	166.50	0000002442	166.50	0100	0983000	5001	3600	4400000	038		
HA1525 - HAWTHORNE POWER SYSTEMS	14384243	860.36	SS100110456	527.36		230.90	0100	0983000	5001	3600	4400000	038		
HA1525 - HAWTHORNE POWER SYSTEMS	14384243	860.36	SS100110456	527.36	0000002442	296.46	0100	0983000	5001	3600	4400000	038		
KO161 - Konica Minolta Premier Finance	14384244	237.08	68183890	237.08	2151-1	237.08	0100	1100699	1110	1000	5600200	666		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op. Unit	PY
MR0200 - MRC / MR. COPY	14384245	810.11	CT3050 IN836134	810.11		810.11	0100	0000424	0000	2420	5800100	024		
SH0095 - SHAW HR CONSULTING, INC.	14384246	1,382.50	CT3326 12190	1,382.50		1,382.50	0100	0000620	0000	7200	5800100	030		
SO0100 - THE SOCO GROUP, INC.	14384247	780.19	0508973- IN	780.19	00000035 59	780.19	0100	0000660	0000	8100	4300560	057		
ST1150 - STATE OF CALIFORNIA	14384248	356.00	SU FH 025- 300039 Doc #4585192 4	356.00		356.00	0100	0000000			9502000			
SU0900 - Superior Vision Services	14384249	18.12	SVS Cobra March 2018	18.12		18.12	0100	0000000			9910099			
VA0050 - VALLEY INDUSTRIAL SPECIALTIES	14384250	2,156.92	A250789	2,156.92	00000036 33	2,156.92	0100	0000660	0000	8100	4300000	057		

Business Unit Total: \$8,676.62

0100	\$8,676.62
<b>TOTAL:</b>	<b>\$8,676.62</b>

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02300: National School District

2018-03-28

Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	Py
0000000046 - Marc Jonathan Isaacs	14384854	61.40	MJI032718	61.40		61.40	0100	6264000	1110	1000	5200000	020		
0000000079 - Raul Martinez	14384855	110.76	RM032718	110.76		110.76	0100	8150100	0000	8100	5200000	057		
AL0250 - ALL AMERICAN PLASTIC & PACKAGING	14384856	7,126.35	0732602	4,223.93		192.27	1300	5310000	0000	3700	4300000	000		
AL0250 - ALL AMERICAN PLASTIC & PACKAGING	14384856	7,126.35	0732602	4,223.93	00000024 45	4,031.66	1300	5310000	0000	3700	4300000	000		
AL0250 - ALL AMERICAN PLASTIC & PACKAGING	14384856	7,126.35	0734666	2,848.27		422.93	1300	5310000	0000	3700	4300000	000		
AL0250 - ALL AMERICAN PLASTIC & PACKAGING	14384856	7,126.35	0734666	2,848.27	00000024 45	2,425.34	1300	5310000	0000	3700	4300000	000		
AL0250 - ALL AMERICAN PLASTIC & PACKAGING	14384856	7,126.35	0734798	54.15	00000024 45	54.15	1300	5310000	0000	3700	4300000	000		
CA2001 - CALIFORNIA DEPT OF EDUCATION	14384857	10,007.00	C-059818	10,007.00		10,007.00	1200	6105100	0001	1000	5800100	000		
CO0060 - JOAN COMMONS	14384858	10,000.00	CT3042 040218	10,000.00		10,000.00	0100	0980290	1110	1000	5800000	000		
FA0110 - FAGEN FRIEDMAN & FULFROST, LLP	14384859	7,627.50	CT3415 56961 022818	7,627.50		7,627.50	0100	0000623	0000	7200	5800700	000		
FI0550 - FISHER WIRELESS SERVICES INC	14384860	349.86	057458	349.86	00000024 40	349.86	0100	0982000	0000	3600	4400000	038		
KI0100 - Kitchen Brains	14384861	613.52	S0007520 2001 001	613.52	00000036 12	613.52	0100	0000660	0000	8100	4300000	057		
ME1000 - HANDY METAL MART	14384862	6.66	445764	6.66	00000036 34	6.66	0100	0000660	0000	8100	4300000	057		
PR0100 - P&R PAPER SUPPLY COMPANY INC	14384863	2,169.91	20147392-00	2,169.91		643.98	1300	5310000	0000	3700	4300000	000		
PR0100 - P&R PAPER SUPPLY COMPANY INC	14384863	2,169.91	20147392-00	2,169.91	00000024 55	1,525.93	1300	5310000	0000	3700	4300000	000		
RI0020 - RCOM RADIO LLC	14384864	424.13	14455	424.13	00000036 13	424.13	0100	0000660	0000	8100	4400000	057		
SA1200 - SAN DIEGO GAS & ELECTRIC	14384865	12,902.36	MT102 1045 573	12,902.36		11,280.95	0100	0000665	0000	8100	5500100	000		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
			681 4 032218											
SA1200 - SAN DIEGO GAS & ELECTRIC	14384865	12,902.36	MT102 1045 573 681 4 032218	12,902.36		1,621.41	0100	9010377	0001	8100	5500100	000		
SD0300 - SD Remodeling	14384866	23,883.00	CT3468 Application 1	23,883.00		23,883.00	0100	8150100	0000	8100	5600150	057		
SH0300 - SHERWIN-WILLIAMS - STORE 8171	14384867	368.86	8083-1	201.57	00000032 06	201.57	0100	0000660	0000	8100	4300000	057		
SH0300 - SHERWIN-WILLIAMS - STORE 8171	14384867	368.86	8166-4	167.29	00000032 06	167.29	0100	0000660	0000	8100	4300000	057		

Business Unit Total: \$75,651.31

0100	\$ 56,348.05
1200	\$ 10,007.00
1300	\$ 9,296.26
<b>TOTAL:</b>	<b>\$ 75,651.31</b>

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**02300: National School District**

**2018-03-29**

Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
CR0600 - Crafted Curriculum, LLC.	14385474	8,300.00	CT3445 1091	8,300.00		8,300.00	0100	6264000	1110	1000	5800000	020		
DI0273 - DISCOUNT TIRE (CAS-06)	14385475	477.88	2368807	477.88	00000029 42	477.88	0100	0000660	0000	8100	4300000	057		
DI0600 - DIXIELINE LUMBER & HOME CENTER	14385476	1,461.38	09-0119395	197.54	00000036 35	197.54	0100	0000660	0000	8100	4300000	057		
DI0600 - DIXIELINE LUMBER & HOME CENTER	14385476	1,461.38	09-0119550	209.19	00000036 35	209.19	0100	0000660	0000	8100	4300000	057		
DI0600 - DIXIELINE LUMBER & HOME CENTER	14385476	1,461.38	09-0119594	211.86	00000036 35	211.86	0100	0000660	0000	8100	4300000	057		
DI0600 - DIXIELINE LUMBER & HOME CENTER	14385476	1,461.38	09-0119610	214.77	00000036 35	214.77	0100	0000660	0000	8100	4300000	057		
DI0600 - DIXIELINE LUMBER & HOME CENTER	14385476	1,461.38	09-0119847	205.25	00000036 35	205.25	0100	0000660	0000	8100	4300000	057		
DI0600 - DIXIELINE LUMBER & HOME CENTER	14385476	1,461.38	09-0119879	245.92	00000036 35	245.92	0100	0000660	0000	8100	4300000	057		
DI0600 - DIXIELINE LUMBER & HOME CENTER	14385476	1,461.38	09-0119998	176.85	00000036 35	176.85	0100	0000660	0000	8100	4300000	057		
DO0400 - DOOR-MAN	14385477	300.15	4149005	300.15	00000030 86	300.15	0100	0000660	0000	8100	4300000	057		
NA0076 - NAPA AUTO PARTS	14385478	53.24	3930-183844	53.24	00000031 65	53.24	0100	0000660	0000	8100	4300000	057		
OF0075 - OFFICE DEPOT	14385479	456.18	11120012 9001	29.79	00000024 29	29.79	1300	5310000	0000	3700	4300000	000		
OF0075 - OFFICE DEPOT	14385479	456.18	11120096 7001	426.39	00000024 29	426.39	1300	5310000	0000	3700	4300000	000		
PE1290 - PERRY FORD OF NATIONAL CITY	14385480	83.96	5112820	83.96	00000032 74	83.96	0100	0000660	0000	8100	4300000	057		
PR0050 - PRACTICAL, INC.	14385481	148.89	CT1294 340032	148.89		148.89	0100	5640568	0000	3140	5800490	022		
SC0304 - SCHOLASTIC BOOK CLUBS	14385482	4,543.30	SC 3282018	4,543.30	00000036 57	4,543.30	0100	9010999	1110	1000	4200000	000		
WI0155 - WILKINSON HADLEY KING & CO LLP	14385483	370.00	CT2889 21913	370.00		370.00	0100	0000623	0000	7190	5800800	000		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
WI0475 - WILLY'S ELECTRONIC SUPPLY CO	14385484	1,211.65	1-378239	1,134.26	0000003471	1,134.26	0100	0000779	0000	7200	4300000	000		
WI0475 - WILLY'S ELECTRONIC SUPPLY CO	14385484	1,211.65	1-378335	77.39	0000003632	77.39	0100	0000660	0000	8100	4300000	057		

Business Unit Total: \$17,406.63

0100	\$ 16,950.45
1300	\$ 456.18
<b>TOTAL:</b>	<b>\$ 17,406.63</b>

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**02300: National School District**

**2018-03-30**

Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
0000000336 - Maximiliano Pulido	14386016	394.60	MO032918	394.60		394.60	0100	0000623	0000	7200	5800000	000		
AS0140 - ASELTINE SCHOOL	14386017	5,344.82	CT3401 032018	5,344.82		5,344.82	0100	6500000	5770	1110	5800500	022		
ED0300 - EDCO DISPOSAL CORPORATION	14386018	3,534.70	MT401 17-F3 102933 033118	232.70		232.70	0100	0000665	0000	8100	5500400	000		
ED0300 - EDCO DISPOSAL CORPORATION	14386018	3,534.70	MT401 17F3 102934 033118	3,302.00		3,302.00	0100	0000665	0000	8100	5500400	000		
FR0200 - FRUTH GROUP	14386019	783.00	262860	783.00	00000036 28	282.75	0100	1100699	1110	1000	5600200	444		
FR0200 - FRUTH GROUP	14386019	783.00	262860	783.00	00000036 28	500.25	0100	1100699	1110	1000	5600200	444		
NA0007 - NATIONAL SCHOOL DISTRICT	14386020	438.46	6THGR03 2918	438.46		438.46	0100	0100837	0000	0000	8699047	000		
NA0650 - NATIONAL CITY CHAMBER	14386021	1,008.00	114585	1,008.00		1,008.00	0100	9010999	1110	1000	5200000	020		
PI0625 - PIPS C/O KEENAN - SETECH	14386022	74,474.08	MT500 199786	74,474.08		74,474.08	0100	0000000			9910360			
PR0050 - PRACTICAL, INC.	14386023	838.23	CT1294 340313	838.23		838.23	0100	5640568	0000	3140	5800490	022		
SE0250 - 701 NATIONAL CITY BLVD FUND	14386024	25,750.00	041418	25,750.00		25,750.00	6200	0000000	0000	8700	5600400	062		
VA0050 - VALLEY INDUSTRIAL SPECIALTIES	14386025	1,339.74	A251454	104.35	00000035 89	104.35	0100	0000660	0000	8100	4300000	057		
VA0050 - VALLEY INDUSTRIAL SPECIALTIES	14386025	1,339.74	A251465	96.41	00000035 89	96.41	0100	0000660	0000	8100	4300000	057		
VA0050 - VALLEY INDUSTRIAL SPECIALTIES	14386025	1,339.74	A251459	441.42	00000035 89	441.42	0100	0000660	0000	8100	4300000	057		
VA0050 - VALLEY INDUSTRIAL SPECIALTIES	14386025	1,339.74	A251464	697.56		156.31	0100	0000660	0000	8100	4300000	057		
VA0050 - VALLEY INDUSTRIAL SPECIALTIES	14386025	1,339.74	A251464	697.56	00000035 89	541.25	0100	0000660	0000	8100	4300000	057		
WI0155 - WILKINSON HADLEY KING & CO LLP	14386026	1,350.00	CT2889 22736	1,350.00		1,350.00	0100	0000623	0000	7190	5800800	000		

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Business Unit Total: \$115,255.63

0100	\$ 89,505.63
6200	\$ 25,750.00
<b>TOTAL:</b>	<b>\$ 115,255.63</b>



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02300: National School District

2018-04-03

Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
AL0110 - Alert Services, Inc.	14386748	1,456.90	5018768	1,456.90	0000003582	142.68	0100	0000626	0000	7200	4300990	000		
AL0110 - Alert Services, Inc.	14386748	1,456.90	5018768	1,456.90	0000003582	195.75	0100	0000626	0000	7200	4300990	000		
AL0110 - Alert Services, Inc.	14386748	1,456.90	5018768	1,456.90	0000003582	258.91	0100	0000626	0000	7200	4300990	000		
AL0110 - Alert Services, Inc.	14386748	1,456.90	5018768	1,456.90	0000003582	429.78	0100	0000626	0000	7200	4300990	000		
AL0110 - Alert Services, Inc.	14386748	1,456.90	5018768	1,456.90	0000003582	429.78	0100	0000626	0000	7200	4300990	000		
AM0100 - AMAZON.COM	14386749	242.21	469765694663	234.23	0000003523	234.23	0100	0000903	1110	1000	4300000	000		
AM0100 - AMAZON.COM	14386749	242.21	465665654744	7.98	0000003567	7.98	0100	6500000	5001	3120	4300000	022		
BE1545 - BEST WAY PRINTING	14386750	204.02	18533	204.02	0000003614	204.02	0100	0000623	0000	7200	4300000	000		
CA3100 - CAROLINA BIOLOGICAL SUPPLY	14386751	297.33	50201408RI	280.72	0000003526	280.72	0100	0000470	1110	1000	4300000	024		
CA3100 - CAROLINA BIOLOGICAL SUPPLY	14386751	297.33	50202510RI	16.61	0000003526	16.61	0100	0000470	1110	1000	4300000	024		
CR1615 - CRLP	14386752	900.00	1001	900.00	0000002347	900.00	0100	3010100	1110	1000	5200000	215		
ED0400 - EDTECHTEAM, INC.	14386753	9,192.20	0003726D	7,747.20	0000003615	-860.80	0100	6264000	1110	1000	5200000	020		
ED0400 - EDTECHTEAM, INC.	14386753	9,192.20	0003726D	7,747.20	0000003615	8,608.00	0100	6264000	1110	1000	5200000	020		
ED0400 - EDTECHTEAM, INC.	14386753	9,192.20	0003676E	1,445.00	0000003653	1,445.00	0100	6264000	1110	1000	5200000	020		
HU0500 - HUNTER'S NURSERY, INC.	14386754	881.08	33568	491.83	0000003171	491.83	0100	0000660	0000	8100	4300000	057		
HU0500 - HUNTER'S NURSERY, INC.	14386754	881.08	33574	389.25		89.25	0100	0000660	0000	8100	4300000	057		
HU0500 - HUNTER'S NURSERY, INC.	14386754	881.08	33574	389.25	0000003171	300.00	0100	0000660	0000	8100	4300000	057		
KA0200 - KAPLAN SCHOOL SUPPLY CORP	14386755	1,170.39	0004714457	1,170.39	0000003594	250.06	0100	0000903	1110	1000	4300000	000		
KA0200 - KAPLAN SCHOOL SUPPLY CORP	14386755	1,170.39	0004714457	1,170.39	0000003594	370.12	0100	0000903	1110	1000	4300000	000		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
KA0200 - KAPLAN SCHOOL SUPPLY CORP	14386755	1,170.39	00047144 57	1,170.39	00000035 94	550.21	0100	0000903	1110	1000	4300000	000		
LI0350 - LIGHTSPEED TECHNOLOGIES	14386756	21.75	112471	21.75	00000036 19	21.75	0100	6500000	5770	1190	4300000	022		
MO1415 - Moore Medical	14386757	245.93	99822751	245.93	00000035 83	47.57	0100	0000626	0000	7200	4300990	000		
MO1415 - Moore Medical	14386757	245.93	99822751	245.93	00000035 83	198.36	0100	0000626	0000	7200	4300990	000		
MO1420 - MORE DIRECT INC	14386758	579.05	5345594	322.89	00000036 08	107.63	0100	3010100	1110	1000	4300000	300		
MO1420 - MORE DIRECT INC	14386758	579.05	5345594	322.89	00000036 08	107.63	0100	3010100	1110	1000	4300000	300		
MO1420 - MORE DIRECT INC	14386758	579.05	5345594	322.89	00000036 08	107.63	0100	3010100	1110	1000	4300000	300		
MO1420 - MORE DIRECT INC	14386758	579.05	5356495	256.16	00000036 47	33.24	0100	0980000	1110	1000	4300000	215		
MO1420 - MORE DIRECT INC	14386758	579.05	5356495	256.16	00000036 47	33.24	0100	0980000	1110	1000	4300000	215		
MO1420 - MORE DIRECT INC	14386758	579.05	5356495	256.16	00000036 47	33.24	0100	0980000	1110	1000	4300000	215		
MO1420 - MORE DIRECT INC	14386758	579.05	5356495	256.16	00000036 47	43.46	0100	0980000	1110	1000	4300000	215		
MO1420 - MORE DIRECT INC	14386758	579.05	5356495	256.16	00000036 47	112.98	0100	0980000	1110	1000	4300000	215		
OF0075 - OFFICE DEPOT	14386759	1,585.03	11635773 3001	613.33	00000036 23	613.33	0100	0000660	0000	8100	4300000	057		
OF0075 - OFFICE DEPOT	14386759	1,585.03	11682683 4001	772.58	00000036 49	253.88	0100	6500000	5001	2100	4300000	022		
OF0075 - OFFICE DEPOT	14386759	1,585.03	11682683 4001	772.58	00000036 49	518.70	0100	6500000	5001	2100	4300000	022		
OF0075 - OFFICE DEPOT	14386759	1,585.03	11682653 2001	199.12	00000036 50	63.18	0100	0000615	0000	7100	4300000	010		
OF0075 - OFFICE DEPOT	14386759	1,585.03	11682653 2001	199.12	00000036 50	63.18	0100	0000615	0000	7100	4300000	010		
OF0075 - OFFICE DEPOT	14386759	1,585.03	11682653 2001	199.12	00000036 50	72.76	0100	0000615	0000	7100	4300000	010		
OR0220 - ORIENTAL TRADING COMPANY	14386760	282.44	68899617 8-01	282.44	00000036 11	7.91	0100	0100835	1110	1000	4300000	500		
OR0220 - ORIENTAL TRADING COMPANY	14386760	282.44	68899617 8-01	282.44	00000036 11	9.89	0100	0100835	1110	1000	4300000	500		
OR0220 - ORIENTAL TRADING COMPANY	14386760	282.44	68899617 8-01	282.44	00000036 11	11.87	0100	0100835	1110	1000	4300000	500		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
OR0220 - ORIENTAL TRADING COMPANY	14386760	282.44	68899617 8-01	282.44	00000036 11	17.81	0100	0100835	1110	1000	4300000	500		
OR0220 - ORIENTAL TRADING COMPANY	14386760	282.44	68899617 8-01	282.44	00000036 11	19.79	0100	0100835	1110	1000	4300000	500		
OR0220 - ORIENTAL TRADING COMPANY	14386760	282.44	68899617 8-01	282.44	00000036 11	25.73	0100	0100835	1110	1000	4300000	500		
OR0220 - ORIENTAL TRADING COMPANY	14386760	282.44	68899617 8-01	282.44	00000036 11	37.07	0100	0100835	1110	1000	4300000	500		
OR0220 - ORIENTAL TRADING COMPANY	14386760	282.44	68899617 8-01	282.44	00000036 11	37.58	0100	0100835	1110	1000	4300000	500		
OR0220 - ORIENTAL TRADING COMPANY	14386760	282.44	68899617 8-01	282.44	00000036 11	55.42	0100	0100835	1110	1000	4300000	500		
OR0220 - ORIENTAL TRADING COMPANY	14386760	282.44	68899617 8-01	282.44	00000036 11	59.37	0100	0100835	1110	1000	4300000	500		
PE0071 - PEARSON ASSESSMENT	14386761	464.52	11555360	464.52	00000036 03	107.87	0100	6500000	5001	3120	4300000	022		
PE0071 - PEARSON ASSESSMENT	14386761	464.52	11555360	464.52	00000036 03	356.65	0100	6500000	5001	3120	4300000	022		
SC0875 - SCHOOL SPECIALTY	14386762	569.99	20812004 8969	569.99	00000035 70	77.65	0100	0980000	1110	1000	4300000	700		
SC0875 - SCHOOL SPECIALTY	14386762	569.99	20812004 8969	569.99	00000035 70	78.71	0100	0980000	1110	1000	4300000	700		
SC0875 - SCHOOL SPECIALTY	14386762	569.99	20812004 8969	569.99	00000035 70	79.79	0100	0980000	1110	1000	4300000	700		
SC0875 - SCHOOL SPECIALTY	14386762	569.99	20812004 8969	569.99	00000035 70	81.21	0100	0980000	1110	1000	4300000	700		
SC0875 - SCHOOL SPECIALTY	14386762	569.99	20812004 8969	569.99	00000035 70	82.52	0100	0980000	1110	1000	4300000	700		
SC0875 - SCHOOL SPECIALTY	14386762	569.99	20812004 8969	569.99	00000035 70	84.40	0100	0980000	1110	1000	4300000	700		
SC0875 - SCHOOL SPECIALTY	14386762	569.99	20812004 8969	569.99	00000035 70	85.71	0100	0980000	1110	1000	4300000	700		
SO0050 - SOCIAL THINKING AND THINK	14386763	89.01	92373	89.01	00000036 10	27.58	0100	6500000	5001	3120	4300000	022		
SO0050 - SOCIAL THINKING AND THINK	14386763	89.01	92373	89.01	00000036 10	61.43	0100	6500000	5001	3120	4300000	022		
SO0100 - THE SOCO GROUP, INC.	14386764	799.23	0511408-IN	799.23	00000035 59	350.00	0100	0000660	0000	8100	4300560	057		
SO0100 - THE SOCO GROUP, INC.	14386764	799.23	0511408-IN	799.23		449.23	0100	0000660	0000	8100	4300560	057		
SO1330 - SOUTHLAND	14386765	3,517.60	SI-75591	1,378.04	00000036 05	0.00	0100	0980000	1110	1000	4400380	900		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
TECHNOLOGY														
SO1330 - SOUTHLAND TECHNOLOGY	14386765	3,517.60	SI-75591	1,378.04	0000003605	6.00	0100	3010100	1110	1000	4400380	900		
SO1330 - SOUTHLAND TECHNOLOGY	14386765	3,517.60	SI-75591	1,378.04	0000003605	23.93	0100	3010100	1110	1000	4400380	900		
SO1330 - SOUTHLAND TECHNOLOGY	14386765	3,517.60	SI-75591	1,378.04	0000003605	68.13	0100	3010100	1110	1000	4400380	900		
SO1330 - SOUTHLAND TECHNOLOGY	14386765	3,517.60	SI-75591	1,378.04	0000003605	1,279.98	0100	3010100	1110	1000	4400380	900		
SO1330 - SOUTHLAND TECHNOLOGY	14386765	3,517.60	SI-75630	68.13	0000003606	68.13	0100	0980300	0000	3130	4300000	000		
SO1330 - SOUTHLAND TECHNOLOGY	14386765	3,517.60	SI-75689	2,071.43	0000003624	5.00	0100	0000620	0000	7200	4400380	030		
SO1330 - SOUTHLAND TECHNOLOGY	14386765	3,517.60	SI-75689	2,071.43	0000003624	6.00	0100	0000620	0000	7200	4400380	030		
SO1330 - SOUTHLAND TECHNOLOGY	14386765	3,517.60	SI-75689	2,071.43	0000003624	51.11	0100	0000620	0000	7200	4400380	030		
SO1330 - SOUTHLAND TECHNOLOGY	14386765	3,517.60	SI-75689	2,071.43	0000003624	68.13	0100	0000620	0000	7200	4400380	030		
SO1330 - SOUTHLAND TECHNOLOGY	14386765	3,517.60	SI-75689	2,071.43	0000003624	123.98	0100	0000620	0000	7200	4400380	030		
SO1330 - SOUTHLAND TECHNOLOGY	14386765	3,517.60	SI-75689	2,071.43	0000003624	182.70	0100	0000620	0000	7200	4400380	030		
SO1330 - SOUTHLAND TECHNOLOGY	14386765	3,517.60	SI-75689	2,071.43	0000003624	183.79	0100	0000620	0000	7200	4400380	030		
SO1330 - SOUTHLAND TECHNOLOGY	14386765	3,517.60	SI-75689	2,071.43	0000003624	1,450.72	0100	0000620	0000	7200	4400380	030		
SU0425 - SUPER DUPER PUBLICATIONS	14386766	169.94	2332303A	169.94	0000003651	19.95	0100	6500000	5770	1190	4300000	022		
SU0425 - SUPER DUPER PUBLICATIONS	14386766	169.94	2332303A	169.94	0000003651	149.99	0100	6500000	5770	1190	4300000	022		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
TH0075 - THERAPY SHOPPE INC	14386767	77.89	324910	77.89	0000003536	77.89	0100	3310000	5750	1130	4300000	022		
TO0112 - TOSHIBA FINANCIAL SERVICES	14386768	511.13	68204413	511.13	0000002056	511.13	0100	1100699	1110	1000	5600200	999		
WE1675 - WESTERN PSYCHOLOGICAL SERVICES	14386769	119.63	WPS-204575	119.63	0000003604	119.63	0100	6500000	5001	3120	4300000	022		

Business Unit Total: \$23,377.27

0100	\$ 23,377.27
<b>TOTAL:</b>	<b>\$ 23,377.27</b>

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02300: National School District

2018-04-04

Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
0000000013 - Lorena Dambois	14387292	23.49	LD032218	23.49		23.49	1200	5210000	0001	1000	4300000	000		
0000000015 - Norma Luna	14387293	9.44	NL032218	9.44		9.44	1200	6105100	0001	1000	4300000	000		
0000000017 - Hada Morales-Lopez	14387294	10.72	HML032218	10.72		10.72	1200	6105100	0001	1000	4300000	000		
0000000087 - Tricia Hernandez	14387295	23.71	TH032218	23.71		23.71	1200	5210000	0001	1000	4300000	000		
0000000107 - Diana Gamboa	14387296	6.50	DG032218	6.50		6.50	1200	5210000	0001	1000	4300000	000		
0000000288 - Lisa Ayala	14387297	7.84	LA031218	7.84		7.84	1200	9024977	7110	2700	5200500	028		
AM0100 - AMAZON.COM	14387298	42.87	568364554433	42.87	0000003546	42.87	0100	6500000	5001	3120	4300000	022		
CH1200 - CHULA VISTA ALARM INC	14387299	390.00	MT85046258	390.00		390.00	0100	0000665	0000	8100	5600100	000		
DI0600 - DIXIELINE LUMBER & HOME CENTER	14387300	149.36	09-0120229	67.40	0000003635	67.40	0100	0000660	0000	8100	4300000	057		
DI0600 - DIXIELINE LUMBER & HOME CENTER	14387300	149.36	09-0120563	81.96	0000003635	81.96	0100	0000660	0000	8100	4300000	057		
ED4500 - EDUPOINT EDUCATIONAL SYSTEMS	14387301	31,317.00	CT450012109	31,317.00		31,317.00	0100	0000630	0000	7700	5800000	000		
EW0100 - EWING	14387302	305.43	4988397	305.43		130.43	0100	0000660	0000	8100	4300000	057		
EW0100 - EWING	14387302	305.43	4988397	305.43	0000003309	175.00	0100	0000660	0000	8100	4300000	057		
FO0301 - FOLLETT LIBRARY RESOURCES	14387303	1,103.91	800921F-3	1,103.91	0000003601	1,103.91	0100	0000440	0000	2420	4300000	215		
FR0200 - FRUTH GROUP	14387304	259.62	264262	153.84	0000003211	65.79	0100	0980000	1110	1000	5600200	600		
FR0200 - FRUTH GROUP	14387304	259.62	264262	153.84	0000003211	88.05	0100	0980000	1110	1000	5600200	600		
FR0200 - FRUTH GROUP	14387304	259.62	264261	105.78	0000003470	9.89	0100	0980000	1110	1000	4400000	900		
FR0200 - FRUTH GROUP	14387304	259.62	264261	105.78	0000003470	42.99	0100	0980000	1110	1000	4400000	900		
FR0200 - FRUTH GROUP	14387304	259.62	264261	105.78	0000003470	9.90	0100	3010100	1110	1000	4400000	900		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
FR0200 - FRUTH GROUP	14387304	259.62	264261	105.78	0000003470	43.00	0100	3010100	1110	1000	4400000	900		
J10400 - JIVE COMMUNICATIONS, INC.	14387305	5,995.77	CT3365 INC-001005446	447.69		447.69	0100	0000665	0000	8100	5900100	000		
J10400 - JIVE COMMUNICATIONS, INC.	14387305	5,995.77	CT3365 INV-000999920	5,548.08		5,548.08	0100	0000665	0000	8100	5900100	000		
KO0160 - KONICA MINOLTA BUSINESS SOLUTI	14387306	310.01	250455467	310.01	0000003660	310.01	0100	1100699	1110	1000	5600200	888		
KO161 - Konica Minolta Premier Finance	14387307	180.05	353649395	180.05	0000003539	180.05	0100	1100699	1110	1000	5600200	777		
LA0220 - La Crosse Technology Ltd	14387308	613.35	2762051	613.35	0000003642	213.59	0100	0000660	0000	8100	4300000	057		
LA0220 - La Crosse Technology Ltd	14387308	613.35	2762051	613.35	0000003642	399.76	0100	0000660	0000	8100	4300000	057		
MI1200 - MISSION JANITORIAL SUPPLIES	14387309	741.02	599423-00	741.02	0000002861	741.02	0100	0000644	0000	8100	4300000	056		
MO1420 - MORE DIRECT INC	14387310	613.33	5312196	613.33	0000003479	613.33	0100	3010100	1110	1000	4300000	500		
NA1450 - NATIONAL LOCKSMITHING INSTITUTE	14387311	995.00	201284	995.00	0000003325	995.00	0100	0000660	0000	8100	5200000	057		
OF0075 - OFFICE DEPOT	14387312	943.34	118107818001	708.91	0000003664	12.16	0100	6500000	5001	2100	4300000	022		
OF0075 - OFFICE DEPOT	14387312	943.34	118107818001	708.91	0000003664	18.18	0100	6500000	5001	2100	4300000	022		
OF0075 - OFFICE DEPOT	14387312	943.34	118107818001	708.91	0000003664	226.19	0100	6500000	5001	2100	4300000	022		
OF0075 - OFFICE DEPOT	14387312	943.34	118107818001	708.91	0000003664	226.19	0100	6500000	5001	2100	4300000	022		
OF0075 - OFFICE DEPOT	14387312	943.34	118107818001	708.91	0000003664	226.19	0100	6500000	5001	2100	4300000	022		
OF0075 - OFFICE DEPOT	14387312	943.34	120072121001	184.29	0000003680	5.42	0100	0000623	0000	7200	4300000	000		
OF0075 - OFFICE DEPOT	14387312	943.34	120072121001	184.29	0000003680	8.96	0100	0000623	0000	7200	4300000	000		
OF0075 - OFFICE DEPOT	14387312	943.34	120072121001	184.29	0000003680	10.02	0100	0000623	0000	7200	4300000	000		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
OF0075 - OFFICE DEPOT	14387312	943.34	12007212 1001	184.29	00000036 80	10.42	0100	0000623	0000	7200	4300000	000		
OF0075 - OFFICE DEPOT	14387312	943.34	12007212 1001	184.29	00000036 80	13.69	0100	0000623	0000	7200	4300000	000		
OF0075 - OFFICE DEPOT	14387312	943.34	12007212 1001	184.29	00000036 80	36.65	0100	0000623	0000	7200	4300000	000		
OF0075 - OFFICE DEPOT	14387312	943.34	12007212 1001	184.29	00000036 80	37.96	0100	0000623	0000	7200	4300000	000		
OF0075 - OFFICE DEPOT	14387312	943.34	12007212 1001	184.29	00000036 80	61.17	0100	0000623	0000	7200	4300000	000		
OF0075 - OFFICE DEPOT	14387312	943.34	12007227 9001	50.14	00000036 80	5.42	0100	0000623	0000	7200	4300000	000		
OF0075 - OFFICE DEPOT	14387312	943.34	12007227 9001	50.14	00000036 80	7.59	0100	0000623	0000	7200	4300000	000		
OF0075 - OFFICE DEPOT	14387312	943.34	12007227 9001	50.14	00000036 80	10.73	0100	0000623	0000	7200	4300000	000		
OF0075 - OFFICE DEPOT	14387312	943.34	12007227 9001	50.14	00000036 80	13.04	0100	0000623	0000	7200	4300000	000		
OF0075 - OFFICE DEPOT	14387312	943.34	12007227 9001	50.14	00000036 80	13.36	0100	0000623	0000	7200	4300000	000		
OR0220 - ORIENTAL TRADING COMPANY	14387313	96.58	68841290 5-01	96.58	00000034 58	13.17	0100	0100835	1110	1000	4300000	500		
OR0220 - ORIENTAL TRADING COMPANY	14387313	96.58	68841290 5-01	96.58	00000034 58	14.27	0100	0100835	1110	1000	4300000	500		
OR0220 - ORIENTAL TRADING COMPANY	14387313	96.58	68841290 5-01	96.58	00000034 58	15.37	0100	0100835	1110	1000	4300000	500		
OR0220 - ORIENTAL TRADING COMPANY	14387313	96.58	68841290 5-01	96.58	00000034 58	15.37	0100	0100835	1110	1000	4300000	500		
OR0220 - ORIENTAL TRADING COMPANY	14387313	96.58	68841290 5-01	96.58	00000034 58	18.66	0100	0100835	1110	1000	4300000	500		
OR0220 - ORIENTAL TRADING COMPANY	14387313	96.58	68841290 5-01	96.58	00000034 58	19.74	0100	0100835	1110	1000	4300000	500		
RE0475 - RSD - NATIONAL CITY	14387314	523.38	61137778-00	404.76	00000034 35	404.76	0100	0000660	0000	8100	4300000	057		
RE0475 - RSD - NATIONAL CITY	14387314	523.38	61137799-00	118.62	00000034 35	118.62	0100	0000660	0000	8100	4300000	057		
SA1200 - SAN DIEGO GAS & ELECTRIC	14387315	36,965.45	MT102 5919 266 448 2 032818	36,965.45		36,965.45	0100	0000665	0000	8100	5500100	000		
SO2075 - SOUTHWEST SCHOOL&OFFICE SUPPLY	14387316	903.06	PINV0404 419	903.06	00000034 36	903.06	0100	0000626	0000	7200	4300990	000		



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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
SU0600 - SUPERIOR TEXT	14387317	48.68	SI003089	36.51	0000003481	36.51	0100	0980110	1110	1000	4200000	000		
SU0600 - SUPERIOR TEXT	14387317	48.68	SI003127	12.17	0000003481	12.17	0100	0980110	1110	1000	4200000	000		
TE1300 - TERMINIX INTERNATIONAL	14387318	37.00	374078582	37.00	0000002614	37.00	0100	0000660	0000	8100	5500600	057		
TH0400 - THOMPSON BUILDING MATERIALS	14387319	354.70	IV-G29544	249.42	0000002159	249.42	0100	0000660	0000	8100	4300000	057		
TH0400 - THOMPSON BUILDING MATERIALS	14387319	354.70	IV-G29587	105.28	0000002159	105.28	0100	0000660	0000	8100	4300000	057		
TO0115 - TOSHIBA FINANCIAL SERVICES	14387320	378.59	354125957	378.59		378.59	0100	1100699	1110	1000	5600200	444		
WE1100 - WESTAIR GASES & EQUIPMENT	14387321	471.22	10654938	67.66	0000003493	67.66	0100	0000660	0000	8100	4300000	057		
WE1100 - WESTAIR GASES & EQUIPMENT	14387321	471.22	10656080	403.56	0000003493	403.56	0100	0000660	0000	8100	4300000	057		
WI0475 - WILLY'S ELECTRONIC SUPPLY CO	14387322	244.30	1-378183	104.75	0000003632	104.75	0100	0000660	0000	8100	4300000	057		
WI0475 - WILLY'S ELECTRONIC SUPPLY CO	14387322	244.30	1-378595	139.55	0000003632	65.25	0100	0000660	0000	8100	4300000	057		
WI0475 - WILLY'S ELECTRONIC SUPPLY CO	14387322	244.30	1-378595	139.55		74.30	0100	0000660	0000	8100	4300000	057		
WO0300 - WORLD BOOK INC.	14387323	3,354.00	0001574133	3,354.00	0000003355	3,354.00	0100	6300000	1110	1000	4300300	020		
XE0100 - XEROX CORPORATION	14387324	432.84	092801400	432.84	0000003440	109.22	0100	0980000	1110	1000	5600200	700		
XE0100 - XEROX CORPORATION	14387324	432.84	092801400	432.84	0000003440	323.62	0100	0980000	1110	1000	5600200	700		

Business Unit Total: \$87,851.56

0100	\$ 87,769.86
1200	\$ 81.70
<b>TOTAL:</b>	<b>\$ 87,851.56</b>

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**02300: National School District**

**2018-04-05**

Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
CO1317 - CDW	14387985	15,239.01	MFQ7051	15,239.01	0000003648	250.00	6200	0981206	1110	1000	4400380	062		
CO1317 - CDW	14387985	15,239.01	MFQ7051	15,239.01	0000003648	14,989.01	6200	0981206	1110	1000	4400380	062		
DI0020 - DIAMOND JACK ENTERPRISES INC	14387986	19,667.20	2446 March 2018	19,667.20	0000002446	19,667.20	1300	5310000	0000	3700	4700000	000		
ED0300 - EDCO DISPOSAL CORPORATION	14387987	242.58	17-FR 288860 033118	242.58	0000002473	242.58	6200	0000000	0000	8100	5500400	062		
GO0301 - GOLD STAR FOODS	14387988	56,061.84	2448 March 2018	56,061.84	0000002448	56,061.84	1300	5310000	0000	3700	4700000	000		
ME0501 - METRO REFRIGERATION	14387989	1,018.52	17879	414.33		190.94	1300	5310000	0000	3700	5600000	000		
ME0501 - METRO REFRIGERATION	14387989	1,018.52	17879	414.33	0000002451	223.39	1300	5310000	0000	3700	5600000	000		
ME0501 - METRO REFRIGERATION	14387989	1,018.52	17882	604.19		266.93	1300	5310000	0000	3700	5600000	000		
ME0501 - METRO REFRIGERATION	14387989	1,018.52	17882	604.19	0000002451	337.26	1300	5310000	0000	3700	5600000	000		
OR0500 - ORKIN EXTERMINATING INC	14387990	7,852.05	27096642 032818	7,852.05	0000002297	7,852.05	0100	0000660	0000	8100	5500600	057		
US0230 - US BANK EQUIPMENT FINANCE	14387991	555.33	35352673 4	555.33	0000002476	555.33	6200	0000000	0000	2700	5600200	062		
XE0120 - XEROX FINANCIAL SERVICES	14387992	610.48	1114038	610.48	0000002234	610.48	0100	0000625	0000	7200	5600200	020		

Business Unit Total: \$101,247.01

0100	\$	8,462.53
1300	\$	76,747.56
6200	\$	16,036.92
<b>TOTAL:</b>	<b>\$</b>	<b>101,247.01</b>

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**02300: National School District**

**2018-04-06**

Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
DI0600 - DIXIELINE LUMBER & HOME CENTER	14388569	281.54	09-0120811	215.26	0000003635	215.26	0100	0000660	0000	8100	4300000	057		
DI0600 - DIXIELINE LUMBER & HOME CENTER	14388569	281.54	09-0120890	66.28	0000003635	66.28	0100	0000660	0000	8100	4300000	057		
DR0300 - Dr. Pedro Olvera	14388570	3,500.00	CT34461708	3,500.00		3,500.00	0100	6500000	5750	1110	5800000	022		
EA0100 - East LA Classic Theatre, Inc.	14388571	18,000.00	CT34741100	18,000.00		18,000.00	0100	0980000	1110	1000	5800000	600		
FR0200 - FRUTH GROUP	14388572	165.59	264652	153.84	0000003628	65.79	0100	1100699	1110	1000	5600200	444		
FR0200 - FRUTH GROUP	14388572	165.59	264652	153.84	0000003628	88.05	0100	1100699	1110	1000	5600200	444		
FR0200 - FRUTH GROUP	14388572	165.59	264507	11.75		11.75	0100	1100699	1110	1000	5600200	444		
GA0020 - GALASSO'S BAKERY	14388573	5,180.63	2447 March 2018	5,180.63	0000002447	5,180.63	1300	5310000	0000	3700	4700000	000		
HA0090 - HANOVER RESEARCH	14388574	40,500.00	CT3263 INV005152	40,500.00		40,500.00	0100	0980190	1110	1000	5800000	000		
HO0230 - HOLLANDIA DAIRY	14388575	24,807.59	2449 March 2018	24,807.59	0000002449	24,807.59	1300	5310000	0000	3700	4700000	000		
SA1200 - SAN DIEGO GAS & ELECTRIC	14388576	118.94	MT101 4272 792 788 9 040218	118.94		118.94	0100	0000665	0000	8100	5500100	000		
ST0100 - STANDARD ELECTRONICS	14388577	2,255.00	30391	2,255.00	0000003337	2,255.00	0100	0000779	0000	8500	6500000	888		

Business Unit Total: \$94,809.29

0100	\$ 64,821.07
1300	\$ 29,988.22
<b>TOTAL:</b>	<b>\$ 94,809.29</b>

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02300: National School District

2018-04-09

Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
AM3100 - AMERI-MEX PLUMBING INC	14389021	2,475.00	6428	2,475.00	0000003668	2,475.00	0100	0000660	0000	8100	5600150	057		
CA1300 - California Association for the Gifted	14389022	750.00	2034721-106806358	150.00	0000003715	150.00	0100	6264000	1110	1000	5200000	020		
CA1300 - California Association for the Gifted	14389022	750.00	2034721-106806435	150.00	0000003715	150.00	0100	6264000	1110	1000	5200000	020		
CA1300 - California Association for the Gifted	14389022	750.00	2034721-106973701	150.00	0000003715	150.00	0100	6264000	1110	1000	5200000	020		
CA1300 - California Association for the Gifted	14389022	750.00	2034721-107108211	150.00	0000003715	150.00	0100	6264000	1110	1000	5200000	020		
CA1300 - California Association for the Gifted	14389022	750.00	2034721-106971654	150.00	0000003715	150.00	0100	6264000	1110	1000	5200000	020		
CA1414 - CALIFORNIA ELECTRIC SUPPLY	14389023	1,976.11	1069-744955	1,976.11	0000003630	1,976.11	0100	0000660	0000	8100	4300000	057		
CA3100 - CAROLINA BIOLOGICAL SUPPLY	14389024	1,379.13	50222339RI	602.76	0000003421	227.62	0100	0000470	1110	1000	4300000	024		
CA3100 - CAROLINA BIOLOGICAL SUPPLY	14389024	1,379.13	50222339RI	602.76	0000003421	375.14	0100	0000470	1110	1000	4300000	024		
CA3100 - CAROLINA BIOLOGICAL SUPPLY	14389024	1,379.13	50223566RI	776.37	0000003421	40.24	0100	0000470	1110	1000	4300000	024		
CA3100 - CAROLINA BIOLOGICAL SUPPLY	14389024	1,379.13	50223566RI	776.37	0000003421	55.35	0100	0000470	1110	1000	4300000	024		
CA3100 - CAROLINA BIOLOGICAL SUPPLY	14389024	1,379.13	50223566RI	776.37	0000003421	340.39	0100	0000470	1110	1000	4300000	024		
CA3100 - CAROLINA BIOLOGICAL SUPPLY	14389024	1,379.13	50223566RI	776.37	0000003421	340.39	0100	0000470	1110	1000	4300000	024		
DE0700 - DEMCO, INC.	14389025	1,435.38	6340439	1,435.38	0000003396	1,435.38	0100	0000440	0000	2420	4300000	020		
ES0220 - REXEL / ESD	14389026	835.40	S120905741.001	835.40	0000003671	835.40	0100	0000660	0000	8100	4300000	057		
EW0100 - EWING	14389027	450.16	7244876A	450.16	0000003682	450.16	0100	0000660	0000	8100	4300000	057		
HA1200 - HANGSAFE HOOKS	14389028	2,120.00	280139	2,120.00	0000003656	2,120.00	0100	0000660	0000	8100	4300000	057		
ME1000 - HANDY METAL MART	14389029	185.15	446552	36.44	0000003634	36.44	0100	0000660	0000	8100	4300000	057		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
ME1000 - HANDY METAL MART	14389029	185.15	446802	148.71	0000003634	148.71	0100	0000660	0000	8100	4300000	057		
MI1030 - MIRACLE PLAYGROUND SALES	14389030	2,584.75	10335	2,584.75	0000002952	2,584.75	0100	0000660	0000	8100	4300000	057		
NA0076 - NAPA AUTO PARTS	14389031	75.98	3930-185853	75.98	0000003165	75.98	0100	0000660	0000	8100	4300000	057		
OP0130 - OPTIMUM FLOORCARE	14389032	563.73	436700	408.54	0000003672	408.54	0100	0000644	0000	8100	4300000	056		
OP0130 - OPTIMUM FLOORCARE	14389032	563.73	436982	155.19	0000003672	155.19	0100	0000644	0000	8100	4300000	056		
PA1120 - PARKHOUSE TIRE - SAN DIEGO	14389033	416.37	3010271981	416.37	0000002711	416.37	0100	0000660	0000	8100	4300000	057		
PA2000 - PARTNERS IN LEARNING	14389034	175.80	2003294	175.80	0000003708	26.65	0100	0980000	1110	1000	4300000	800		
PA2000 - PARTNERS IN LEARNING	14389034	175.80	2003294	175.80	0000003708	149.15	0100	0980000	1110	1000	4300000	800		
PE1290 - PERRY FORD OF NATIONAL CITY	14389035	16.00	5113166	16.00	0000003274	16.00	0100	0000660	0000	8100	4300000	057		
PR0050 - PRACTICAL, INC.	14389036	164.66	CT1294340376	164.66		164.66	0100	5640568	0000	3140	5800490	022		
RCF1 - NATIONAL SCHOOL DIST.	14389037	377.50	RCF1040218	377.50		377.50	0100	9999000	0000	0000	7999000	000		
RCF2 - NATIONAL SCHOOL DIST	14389038	224.00	RCF20402018	224.00		224.00	0100	9999000	0000	0000	7999000	000		
SA1200 - SAN DIEGO GAS & ELECTRIC	14389039	9,298.03	MT10110657494303040318	9,298.03		9,298.03	0100	0000665	0000	8100	5500100	000		
SA1200 - SAN DIEGO GAS & ELECTRIC	14389040	5,054.60	MT10173985942328040318	5,054.60		5,054.60	0100	0000665	0000	8100	5500100	000		
SO0100 - THE SOCO GROUP, INC.	14389041	834.87	0514255-IN	834.87	0000003696	834.87	0100	0000660	0000	8100	4300560	057		
<del>SOT175 - SOUTH BAY FENCE INC</del>	<del>14389042</del>	<del>235.48</del>	<del>086622</del>	<del>235.48</del>	<del>0000001354</del>	<del>235.48</del>	<del>0100</del>	<del>0000660</del>	<del>0000</del>	<del>8100</del>	<del>4300000</del>	<del>057</del>		4/12/18
VA0050 - VALLEY INDUSTRIAL SPECIALTIES	14389043	1,466.54	A251123	1,466.54	0000003670	1,466.54	0100	0000660	0000	8100	4300000	057		

Business Unit Total: \$33,094.64

0100	\$ 33,094.64
<b>TOTAL:</b>	<b>\$ 33,094.64</b>

May 9, 2018 Dept gave wrong PO# to pay against

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**02300: National School District**

**2018-04-10**

Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
0000000058 - Leticia Segura	14389585	23.98	LS040618	23.98		23.98	0100	6500000	5001	2100	5200000	022		
0000000179 - Jessica Yoon	14389586	47.69	JY040618	47.69		47.69	0100	6264000	1110	1000	5200000	020		
0000000338 - Linda Lynn Landry	14389587	791.09	LLL032918	791.09		791.09	0100	6500000	5770	1110	2100000	022		
BC0100 - BCK Programs, LLC.	14389588	4,743.00	CT34561155	4,743.00		4,743.00	0100	0000779	0000	7200	5800000	000		
CO1400 - COMPREHENSIVE DRUG TESTING	14389589	62.00	44950	62.00	0000002652	62.00	0100	0000620	0000	7200	4300000	030		
EX0200 - EXCELSIOR ACADEMY	14389590	3,319.05	CT34097097	3,319.05		3,319.05	0100	6500000	5770	1110	5800500	022		
GO0550 - GOPHER SPORT	14389591	1,555.27	9440194	1,555.27	0000003675	57.19	0100	0980100	1110	1000	4300000	000		
GO0550 - GOPHER SPORT	14389591	1,555.27	9440194	1,555.27	0000003675	76.21	0100	0980100	1110	1000	4300000	000		
GO0550 - GOPHER SPORT	14389591	1,555.27	9440194	1,555.27	0000003675	127.11	0100	0980100	1110	1000	4300000	000		
GO0550 - GOPHER SPORT	14389591	1,555.27	9440194	1,555.27	0000003675	127.11	0100	0980100	1110	1000	4300000	000		
GO0550 - GOPHER SPORT	14389591	1,555.27	9440194	1,555.27	0000003675	127.11	0100	0980100	1110	1000	4300000	000		
GO0550 - GOPHER SPORT	14389591	1,555.27	9440194	1,555.27	0000003675	127.11	0100	0980100	1110	1000	4300000	000		
GO0550 - GOPHER SPORT	14389591	1,555.27	9440194	1,555.27	0000003675	127.11	0100	0980100	1110	1000	4300000	000		
GO0550 - GOPHER SPORT	14389591	1,555.27	9440194	1,555.27	0000003675	127.11	0100	0980100	1110	1000	4300000	000		
GO0550 - GOPHER SPORT	14389591	1,555.27	9440194	1,555.27	0000003675	127.17	0100	0980100	1110	1000	4300000	000		
GO0550 - GOPHER SPORT	14389591	1,555.27	9440194	1,555.27	0000003675	171.57	0100	0980100	1110	1000	4300000	000		
GO0550 - GOPHER SPORT	14389591	1,555.27	9440194	1,555.27	0000003675	203.07	0100	0980100	1110	1000	4300000	000		
GO0550 - GOPHER SPORT	14389591	1,555.27	9440194	1,555.27	0000003675	284.51	0100	0980100	1110	1000	4300000	000		
HA1525 - HAWTHORNE POWER SYSTEMS	14389592	333.00	SS100110546	166.50	0000002441	166.50	0100	0982000	0000	3600	4400000	038		
HA1525 - HAWTHORNE POWER SYSTEMS	14389592	333.00	SS100110547	166.50	0000002442	166.50	0100	0983000	5001	3600	4400000	038		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
KO0160 - KONICA MINOLTA BUSINESS SOLUTI	14389593	564.97	251076708	564.97	0000002111	564.97	0100	1100699	1110	1000	5600200	555		
MI1200 - MISSION JANITORIAL SUPPLIES	14389594	66.91	600007-00	66.91	0000002861	66.91	0100	0000644	0000	8100	4300000	056		
MM0200 - MMJ Construction	14389595	192,869.00	CT3444 APP 3	192,869.00		192,869.00	0100	6230000	0000	8500	6200000	000		
SA0280 - SAMBASAFETY	14389596	41.80	INV00072165	41.80	0000002443	41.80	0100	0982000	0000	3600	4400000	038		
SA1200 - SAN DIEGO GAS & ELECTRIC	14389597	103.25	MT102 4440 142 383 9 040418	103.25		103.25	0100	0000665	0000	8100	5500100	000		
SD0300 - SD Remodeling	14389598	18,252.00	CT3468 App. 2	18,252.00		18,252.00	0100	8150100	0000	8100	5600150	057		
SP0250 - SPECIALIZED THERAPY SERVICES	14389599	2,730.00	CT3399 0218-3970	2,730.00		2,730.00	0100	6500000	5770	3150	5800000	022		
TO0111 - TOSHIBA BUSINESS SOLUTIONS	14389600	3,913.28	14399025	3,913.28	0000002873	3,913.28	0100	1100699	1110	1000	5600200	333		
WE1390 - WESTERN ENVIRONMENTAL & SAFETY	14389601	4,325.00	18-208	2,390.00	0000003683	2,390.00	0100	0000660	0000	8100	5600150	057		
WE1390 - WESTERN ENVIRONMENTAL & SAFETY	14389601	4,325.00	17-193	525.00	0000003684	525.00	0100	0000660	0000	8100	5800000	057		
WE1390 - WESTERN ENVIRONMENTAL & SAFETY	14389601	4,325.00	18-194	525.00	0000003684	525.00	0100	0000660	0000	8100	5800000	057		
WE1390 - WESTERN ENVIRONMENTAL & SAFETY	14389601	4,325.00	18-212	595.00	0000003684	595.00	0100	0000660	0000	8100	5800000	057		
WE1390 - WESTERN ENVIRONMENTAL & SAFETY	14389601	4,325.00	18-213	290.00	0000003684	290.00	0100	0000660	0000	8100	5800000	057		
YO0200 - ARTS FOR LEARNING SAN DIEGO	14389602	1,042.50	CT3323 0000911	1,042.50		1,042.50	0100	0980000	1110	1000	5800100	000		

Business Unit Total: \$234,783.79

<b>0100</b>	<b>\$ 234,783.79</b>
<b>TOTAL:</b>	<b>\$ 234,783.79</b>

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02300: National School District

2018-04-11

Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
0000000337 - Martha Carranza	14390285	54.78	MC040618	54.78		54.78	0100	6264000	1110	1000	5200000	020		
BA0760 - Baker Distribution Company	14390286	1,190.65	V281570	1,190.65	0000003085	1,190.65	0100	0000660	0000	8100	4300000	057		
CO0500 - COPY LINK	14390287	278.54	AR229425	278.54	0000002474	278.54	6200	0000100	1110	1000	5600200	062		
DA0110 - D'Amico Printing & Graphics, Inc.	14390288	67.43	15000	67.43	0000003593	7.61	0100	0000460	0000	2700	4300000	100		
DA0110 - D'Amico Printing & Graphics, Inc.	14390288	67.43	15000	67.43	0000003593	59.82	0100	0000460	0000	2700	4300000	100		
EM0075 - EMCOM ELECTRONIC SYSTEMS INC	14390289	54.00	22289	54.00	0000002472	54.00	6200	0000000	0000	8100	5500000	062		
GR0200 - GRAINGER	14390290	240.84	9744258790	14.26	0000003046	14.26	0100	0000660	0000	8100	4300000	057		
GR0200 - GRAINGER	14390290	240.84	9744592578	226.58	0000003046	226.58	0100	0000660	0000	8100	4300000	057		
KO0160 - KONICA MINOLTA BUSINESS SOLUTI	14390291	5,875.87	250894234	1,194.71		324.71	0100	0000623	0000	7200	5600200	000		
KO0160 - KONICA MINOLTA BUSINESS SOLUTI	14390291	5,875.87	250894234	1,194.71	0000000312	435.00	0100	0000623	0000	7200	5600200	000		
KO0160 - KONICA MINOLTA BUSINESS SOLUTI	14390291	5,875.87	250894234	1,194.71	0000000312	435.00	0100	0000626	0000	7200	5600200	000		
KO0160 - KONICA MINOLTA BUSINESS SOLUTI	14390291	5,875.87	250939850	145.68	0000002108	145.68	0100	1100699	1110	1000	5600200	555		
KO0160 - KONICA MINOLTA BUSINESS SOLUTI	14390291	5,875.87	251011409	4,535.48	0000003490	1,905.20	0100	0000625	0000	7200	5600200	020		
KO0160 - KONICA MINOLTA BUSINESS SOLUTI	14390291	5,875.87	251011409	4,535.48	0000003490	2,630.28	0100	0000625	0000	7200	5600200	020		
OR0500 - ORKIN EXTERMINATING INC	14390292	383.00	NATLSD0318	383.00	0000002452	383.00	1300	5310000	0000	8100	5500600	000		
RA0400 - RAYNE WATER SYSTEMS	14390293	235.00	MT310029671040418	167.00		167.00	0100	0000665	0000	8100	5600100	000		
RA0400 - RAYNE WATER SYSTEMS	14390293	235.00	MT312208477	68.00		68.00	0100	0000460	0000	2700	5600100	400		



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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
			040418											
RI0050 - RICK'S RV SERVICE CENTER	14390294	124.29	157164	59.39	0000003587	59.39	0100	0000660	0000	8100	5600150	057		
RI0050 - RICK'S RV SERVICE CENTER	14390294	124.29	157657	64.90	0000003587	64.90	0100	0000660	0000	8100	5600150	057		
SA0730 - COUNTY OF SAN DIEGO	14390295	299.00	DEH2006-FFPP419398	299.00	0000003731	50.00	1300	5310000	0000	3700	4300000	000		
SA0730 - COUNTY OF SAN DIEGO	14390295	299.00	DEH2006-FFPP419398	299.00	0000003731	249.00	1300	5310000	0000	3700	4300000	000		
SO1227 - SO-CAL TRUCK STOP	14390296	4,998.99	MT831 March 2018	4,998.99		2,133.15	0100	0982000	0000	3600	4300560	038		
SO1227 - SO-CAL TRUCK STOP	14390296	4,998.99	MT831 March 2018	4,998.99		2,865.84	0100	0983000	5001	3600	4300560	038		
SO1330 - SOUTHLAND TECHNOLOGY	14390297	272.53	SI-75868	272.53	0000003699	272.53	0100	3010100	1110	1000	4300000	100		
SU0225 - SUZUKI MUSIC USA, LLC.	14390298	393.96	5479	393.96	0000003673	393.96	0100	0980100	1110	1000	4300000	000		
TO0111 - TOSHIBA BUSINESS SOLUTIONS	14390299	2,208.11	14399244	2,208.11	0000003725	1,067.69	0100	0000616	0000	7100	5600200	010		
TO0111 - TOSHIBA BUSINESS SOLUTIONS	14390299	2,208.11	14399244	2,208.11	0000003725	1,140.42	0100	0000616	0000	7100	5600200	010		
TO0115 - TOSHIBA FINANCIAL SERVICES	14390300	939.67	354588139	160.12	0000002232	160.12	0100	0000660	0000	8100	5600200	057		
TO0115 - TOSHIBA FINANCIAL SERVICES	14390300	939.67	354588139.	160.12	0000002228	160.12	1300	5310000	0000	3700	4400380	000		
TO0115 - TOSHIBA FINANCIAL SERVICES	14390300	939.67	354588139..	376.43	0000002231	376.43	0100	1100699	1110	1000	5600200	333		
TO0115 - TOSHIBA FINANCIAL SERVICES	14390300	939.67	354588402	243.00	0000002227	243.00	0100	0000421	0000	2100	5600200	020		
WA1175 - WAXIE SANITARY SUPPLY	14390301	25,573.76	445974200 033118	25,573.76	0000003591	1,828.27	0100	0000644	0000	8100	4300000	056		
WA1175 - WAXIE SANITARY SUPPLY	14390301	25,573.76	445974200 033118	25,573.76	0000003591	2,173.40	0100	0000644	0000	8100	4300000	056		
WA1175 - WAXIE SANITARY SUPPLY	14390301	25,573.76	445974200 033118	25,573.76	0000003591	2,185.01	0100	0000644	0000	8100	4300000	056		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
WA1175 - WAXIE SANITARY SUPPLY	14390301	25,573.76	44597420 0 033118	25,573.76	00000035 91	4,310.40	0100	0000644	0000	8100	4300000	056		
WA1175 - WAXIE SANITARY SUPPLY	14390301	25,573.76	44597420 0 033118	25,573.76	00000035 91	3,683.28	0100	0000644	0000	8100	4300000	225		
WA1175 - WAXIE SANITARY SUPPLY	14390301	25,573.76	44597420 0 033118	25,573.76	00000035 91	2,627.35	0100	0000644	0000	8100	4300000	444		
WA1175 - WAXIE SANITARY SUPPLY	14390301	25,573.76	44597420 0 033118	25,573.76	00000035 91	1,351.88	0100	0000644	0000	8100	4300000	555		
WA1175 - WAXIE SANITARY SUPPLY	14390301	25,573.76	44597420 0 033118	25,573.76	00000035 91	2,424.64	0100	0000644	0000	8100	4300000	666		
WA1175 - WAXIE SANITARY SUPPLY	14390301	25,573.76	44597420 0 033118	25,573.76	00000035 91	4,425.23	0100	0000644	0000	8100	4300000	777		
WA1175 - WAXIE SANITARY SUPPLY	14390301	25,573.76	44597420 0 033118	25,573.76	00000035 91	564.30	0100	0000644	0000	8100	4300000	888		
WE2000 - WEST MUSIC	14390302	76.20	SI1588910	76.20	00000036 79	76.20	0100	0980100	1110	1000	4300000	000		

Business Unit Total: \$43,266.62

0100	\$ 42,091.96
1300	\$ 842.12
6200	\$ 332.54
<b>TOTAL:</b>	<b>\$ 43,266.62</b>

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**02300: National School District**

**2018-04-12**

Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
0000000030 - Meghann O'Connor	14390938	77.00	MO040518	77.00		77.00	0100	0982000	1110	3600	5800000	022		
0000000045 - Margaret De La Paz	14390939	31.48	MDLP041018	31.48		31.48	0100	6264000	1110	1000	5200000	020		
0000000060 - Lorena Aguilar	14390940	69.55	LA040418	69.55		69.55	0100	0000100	1110	1000	4300000	600		
0000000179 - Jessica Yoon	14390941	99.74	JY040518	99.74		99.74	0100	0000100	1110	1000	4200000	900		
0000000249 - Luz Maria Allshouse	14390942	563.60	LMA040618	563.60		563.60	0100	6264000	1110	1000	5200000	020		
0000000297 - Isabel Silva	14390943	16.95	IS022318	16.95		16.95	0100	0000460	0000	2700	4300000	300		
0000000325 - Kimberly Tobias	14390944	67.60	KT031518	67.60		67.60	0100	3010100	1110	1000	4300000	100		
0000000339 - Caren Ballestamon	14390945	89.98	CB031618	89.98		89.98	0100	3010100	1110	1000	4300000	100		
CA3340 - CATHOLIC CHARITIES	14390946	1,200.00	2478040218	1,200.00	0000002478	1,200.00	6200	0000100	1110	3110	5800000	062		
CH0800 - RADY CHILDREN'S HOSPITAL	14390947	8,168.56	CT0417A1034	8,168.56		8,168.56	1200	5210000	0001	3140	5800000	000		
CU0412 - CURRIER & HUDSON	14390948	16,531.64	CT3377040218	16,531.64		16,531.64	0100	0000616	0000	7200	5800700	010		
DE0220 - KING BUSINESS SERVICES, INC.	14390949	2,086.14	142929	2,086.14	0000003695	2,086.14	0100	0000660	0000	8100	4300000	057		
DI0600 - DIXIELINE LUMBER & HOME CENTER	14390950	889.95	09-0121217	38.32	0000003635	38.32	0100	0000660	0000	8100	4300000	057		
DI0600 - DIXIELINE LUMBER & HOME CENTER	14390950	889.95	09-0121321	31.31	0000003635	31.31	0100	0000660	0000	8100	4300000	057		
DI0600 - DIXIELINE LUMBER & HOME CENTER	14390950	889.95	09-0121307	147.40	0000003719	147.40	0100	0000660	0000	8100	4300000	057		
DI0600 - DIXIELINE LUMBER & HOME CENTER	14390950	889.95	09-0121442	425.95	0000003719	425.95	0100	0000660	0000	8100	4300000	057		
DI0600 - DIXIELINE LUMBER & HOME CENTER	14390950	889.95	09-0121486	152.94	0000003719	152.94	0100	0000660	0000	8100	4300000	057		
DI0600 - DIXIELINE LUMBER & HOME	14390950	889.95	09-0121491	94.03	0000003719	94.03	0100	0000660	0000	8100	4300000	057		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
CENTER														
IN0390 - INTERPRETERS UNLIMITED	14390951	430.00	CT3030 135574	230.00		230.00	0100	3010100	1110	1000	4300000	100		
IN0390 - INTERPRETERS UNLIMITED	14390951	430.00	CT3030 135802	200.00		200.00	0100	3010100	1110	1000	4300000	100		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		396.37	0100	0000100	1110	1000	4200000	900		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		500.00	0100	0000193	1110	1000	4200000	900		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		116.50	0100	0000460	0000	2700	4300000	200		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		71.78	0100	0000460	0000	2700	4300000	215		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		48.52	0100	0000460	0000	2700	4300000	600		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		54.68	0100	0000460	0000	2700	4300000	700		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		157.30	0100	0000460	0000	2700	4300000	900		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		81.53	0100	0000500	0000	3140	4300000	022		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		162.04	0100	0000500	0000	3140	4300000	022		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		644.20	0100	0000615	0000	7100	4300000	010		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		63.52	0100	0000623	0000	7200	4300000	000		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		75.22	0100	0000626	0000	7200	4300000	000		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		332.75	0100	0000779	0000	7200	4300000	000		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		585.91	0100	0000660	0000	8100	4300000	057		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		759.71	0100	0000100	1110	1000	4300000	600		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		115.00	0100	0000100	1110	1000	4300000	900		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		98.04	0100	0000460	1110	1000	4300000	700		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		48.99	0100	0000570	1110	1000	4300000	200		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		116.02	0100	0000570	1110	1000	4300000	400		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		249.39	0100	0000570	1110	1000	4300000	500		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		35.97	0100	0000580	1110	1000	4300000	500		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		14.08	0100	0100835	1110	1000	4300000	500		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		384.00	0100	0100837	1110	1000	4300000	700		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		79.44	0100	0944003	1110	1000	4300000	020		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		634.19	0100	0980000	1110	1000	4300000	215		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		138.10	0100	0980000	1110	1000	4300000	800		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		36.74	0100	0980000	1110	1000	4300000	900		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		126.50	0100	3010100	1110	1000	4300000	100		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		1,022.85	0100	3010100	1110	1000	4300000	215		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		415.30	0100	3010100	1110	1000	4300000	300		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		-112.26	0100	3010100	1110	1000	4300000	500		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		268.97	0100	3010100	1110	1000	4300000	600		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		407.62	0100	3010100	1110	1000	4300000	600		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		-65.18	0100	3010100	1110	1000	4300000	700		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		817.64	0100	3010100	1110	1000	4300000	900		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		62.93	0100	0000460	8100	5000	4300000	600		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		11.36	1200	5210500	0001	1000	4300000	000		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		19.79	0100	0000460	1110	1000	4300350	600		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		26.48	0100	3010100	1110	1000	4300350	600		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		28.96	0100	0000500	0000	2100	4300400	022		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		175.51	0100	0000615	0000	7100	4300400	010		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		129.56	0100	0944003	0000	7200	4300400	020		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		433.61	0100	0980000	1110	1000	4300400	800		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		68.78	0100	0980140	8100	5000	4300400	020		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		-64.98	0100	0980000	1110	1000	4400000	800		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		25.21	1200	5210000	0001	3140	4400000	000		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		39.51	1300	5310000	0000	3700	4700000	000		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		249.00	0100	6264000	0000	2100	5200000	020		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		170.41	0100	0000460	0000	2700	5200000	300		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		1,735.00	0100	0000615	0000	7100	5200000	010		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		50.00	0100	0000618	0000	7100	5200000	002		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		1,436.46	0100	0000618	0000	7100	5200000	003		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		50.00	0100	0000618	0000	7100	5200000	007		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		100.00	0100	0000620	0000	7200	5200000	030		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		-218.00	0100	6264000	0000	7200	5200000	020		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		418.96	0100	0000660	0000	8100	5200000	057		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		360.00	0100	0980260	1110	1000	5200000	000		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		216.96	0100	6500000	5001	2100	5200000	022		



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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		72.00	0100	0982000	1110	3600	5800000	022		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		322.05	0100	0927003	1110	1000	5800710	020		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		70.00	0100	0000620	0000	7200	5800845	030		
MI1151 - MISSION FEDERAL CREDIT UNION	14390952	14,914.71	MFCU P-Card March 2018	14,914.71		43.72	0100	0000460	0000	2700	5900300	900		
NO0450 - MICRO FOCUS SOFTWARE INC.	14390953	31,014.00	220240737	31,014.00	0000003732	980.00	0100	0000633	0000	7700	4300300	055		
NO0450 - MICRO FOCUS SOFTWARE INC.	14390953	31,014.00	220240737	31,014.00	0000003732	2,600.00	0100	0000633	0000	7700	4300300	055		
NO0450 - MICRO FOCUS SOFTWARE INC.	14390953	31,014.00	220240737	31,014.00	0000003732	4,176.00	0100	0000633	0000	7700	4300300	055		
NO0450 - MICRO FOCUS SOFTWARE INC.	14390953	31,014.00	220240737	31,014.00	0000003732	4,698.00	0100	0000633	0000	7700	4300300	055		
NO0450 - MICRO FOCUS SOFTWARE INC.	14390953	31,014.00	220240737	31,014.00	0000003732	18,560.00	0100	0000633	0000	7700	4300300	055		
OF0075 - OFFICE DEPOT	14390954	1,272.20	115708697001	985.14	0000003618	287.03	0100	6500000	5001	2100	4300000	022		
OF0075 - OFFICE DEPOT	14390954	1,272.20	115708697001	985.14	0000003618	698.11	0100	6500000	5001	2100	4300000	022		
OF0075 - OFFICE DEPOT	14390954	1,272.20	115710447001	287.06	0000003627	287.06	0100	6500000	5001	2100	4300000	022		
UN0900 - UNIFIRST CORPORATION	14390955	5,285.84	MT502 March 2018	5,285.84		5,285.84	0100	0000665	0000	8100	5500500	000		
VO0150 - VOLUNTEERS OF AMERICA SW CALIF	14390956	17,608.50	CINV-104	17,608.50	0000002479	17,608.50	6200	5310000	0000	3700	4700000	062		
WI0475 - WILLY'S ELECTRONIC SUPPLY CO	14390957	139.52	1-378819	139.52	0000003707	139.52	0100	0000660	0000	8100	4300000	057		
YM0013 - YMCA OVERNIGHT CAMPS	14390958	476.00	3215-20180305	476.00		476.00	0100	3010101	1110	1000	4300100	333		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
YM0021 - YMCA OF SAN DIEGO COUNTY	14390959	239,104.17	CT3045 NSD-0318	239,104.17		239,104.17	0100	9065100	1110	1000	5800000	026		
YO0200 - ARTS FOR LEARNING SAN DIEGO	14390960	7,660.00	CT3322 0000625	7,660.00		7,660.00	0100	0922003	1110	1000	5800100	020		

Business Unit Total: \$347,797.13

0100	\$ 320,743.99
1200	\$ 8,205.13
1300	\$ 39.51
6200	\$ 18,808.50
<b>TOTAL:</b>	<b>\$ 347,797.13</b>

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02300: National School District

2018-04-13

Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
0000000052 - Sarah Flora	14391596	48.63	SF041018	48.63		48.63	0100	6264000	1110	1000	5200000	020		
0000000090 - Patricia Peña	14391597	87.28	PPEÑA041018	87.28		87.28	0100	6264000	1110	1000	5200000	020		
0000000168 - Katie Crosbie	14391598	12.99	KC031518	12.99		12.99	0100	3010100	1110	1000	4300000	300		
0000000215 - Angelica Hernandez	14391599	12.99	AH040518	12.99		12.99	0100	3010100	1110	1000	4300000	300		
0000000228 - Veronica Ojeda Contreras	14391600	17.55	VC030918	17.55		17.55	0100	3010100	1110	1000	4300000	300		
0000000301 - Brenna Baringer	14391601	14.64	BB040618	14.64		14.64	0100	3010100	1110	1000	4300000	100		
0000000341 - Danielle Abrams	14391602	71.94	DA041018	71.94		71.94	0100	6264000	1110	1000	5200000	020		
0000000342 - Lynn Carswell	14391603	71.94	LC041018	71.94		71.94	0100	6264000	1110	1000	5200000	020		
0000000343 - Angela Franco	14391604	371.54	AF041018	371.54		371.54	0100	6264000	1110	1000	1100300	020		
HO0350 - THE HOME DEPOT	14391605	2,527.76	2011138	85.74	0000003669	85.74	0100	0000660	0000	8100	4300000	057		
HO0350 - THE HOME DEPOT	14391605	2,527.76	2031224	26.01	0000003669	26.01	0100	0000660	0000	8100	4300000	057		
HO0350 - THE HOME DEPOT	14391605	2,527.76	2031281	34.99	0000003669	34.99	0100	0000660	0000	8100	4300000	057		
HO0350 - THE HOME DEPOT	14391605	2,527.76	ADJ 2222020	-68.93		-68.93	0100	0000660	0000	8100	4300000	057		
HO0350 - THE HOME DEPOT	14391605	2,527.76	10316	68.60	0000003669	68.60	0100	0000660	0000	8100	4300000	057		
HO0350 - THE HOME DEPOT	14391605	2,527.76	3230283	101.83	0000003669	101.83	0100	0000660	0000	8100	4300000	057		
HO0350 - THE HOME DEPOT	14391605	2,527.76	651011	8.70	0000003669	8.70	0100	0000660	0000	8100	4300000	057		
HO0350 - THE HOME DEPOT	14391605	2,527.76	9243789	169.48	0000003669	169.48	0100	0000660	0000	8100	4300000	057		
HO0350 - THE HOME DEPOT	14391605	2,527.76	9391854	430.39	0000003669	430.39	0100	0000660	0000	8100	4300000	057		
HO0350 - THE HOME DEPOT	14391605	2,527.76	7032932	204.12	0000003669	204.12	0100	0000660	0000	8100	4300000	057		
HO0350 - THE HOME DEPOT	14391605	2,527.76	6230605	111.74	0000003669	111.74	0100	0000660	0000	8100	4300000	057		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
HO0350 - THE HOME DEPOT	14391605	2,527.76	6230608	147.83	0000003669	147.83	0100	0000660	0000	8100	4300000	057		
HO0350 - THE HOME DEPOT	14391605	2,527.76	3693858	108.75	0000003669	108.75	0100	0000660	0000	8100	4300000	057		
HO0350 - THE HOME DEPOT	14391605	2,527.76	1244486	289.74	0000003669	289.74	0100	0000660	0000	8100	4300000	057		
HO0350 - THE HOME DEPOT	14391605	2,527.76	9033925	192.05	0000003669	192.05	0100	0000660	0000	8100	4300000	057		
HO0350 - THE HOME DEPOT	14391605	2,527.76	4231230	19.42	0000003669	19.42	0100	0000660	0000	8100	4300000	057		
HO0350 - THE HOME DEPOT	14391605	2,527.76	4412763	597.30	0000003706	597.30	0100	0980000	1110	1000	4300000	700		
IN0390 - INTERPRETERS UNLIMITED	14391607	230.00	CT3030135571	230.00		230.00	0100	0980800	8100	5000	5800000	215		
KA0100 - KAISER FOUNDATION HEALTH PLAN	14391608	19,178.70	000295763-0001MAY 2018	19,178.70		1,949.05	6200	0000460	0000	2100	3401000	062		
KA0100 - KAISER FOUNDATION HEALTH PLAN	14391608	19,178.70	000295763-0001MAY 2018	19,178.70		413.26	6200	0981115	0000	2100	3401000	062		
KA0100 - KAISER FOUNDATION HEALTH PLAN	14391608	19,178.70	000295763-0001MAY 2018	19,178.70		7,215.03	6200	0000100	1110	1000	3401000	062		
KA0100 - KAISER FOUNDATION HEALTH PLAN	14391608	19,178.70	000295763-0001MAY 2018	19,178.70		1,215.69	6200	0981101	1110	1000	3401000	062		
KA0100 - KAISER FOUNDATION HEALTH PLAN	14391608	19,178.70	000295763-0001MAY 2018	19,178.70		584.85	6200	0981104	1110	1000	3401000	062		
KA0100 - KAISER FOUNDATION HEALTH PLAN	14391608	19,178.70	000295763-0001MAY 2018	19,178.70		614.23	6200	0981200	1110	1000	3401000	062		
KA0100 - KAISER FOUNDATION HEALTH PLAN	14391608	19,178.70	000295763-0001MAY 2018	19,178.70		3,474.99	6200	1400000	1110	1000	3401000	062		
KA0100 - KAISER FOUNDATION HEALTH PLAN	14391608	19,178.70	000295763-0001MAY 2018	19,178.70		2,166.64	6200	0000460	0000	2700	3402000	062		
KA0100 - KAISER FOUNDATION HEALTH PLAN	14391608	19,178.70	000295763-0001MAY 2018	19,178.70		1,544.96	6200	0000000	0000	8100	3402000	062		
SA1200 - SAN DIEGO GAS & ELECTRIC	14391609	20.89	MT10244401445568040918	20.89		20.89	0100	0000665	0000	8100	5500100	000		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
SD0300 - SD Remodeling	14391610	330.00	CT3468 App. 2-2	330.00		330.00	0100	8150100	0000	8100	5600150	057		
SO1115 - SOUTH BAY WINDOW & GLASS CO.	14391611	235.48	086622.	235.48	0000003273	235.48	0100	0000660	0000	8100	4300000	057		
SO2900 - SOUTHWEST MOBILE STORAGE,INC	14391612	141.57	RI541850	141.57	0000003654	32.82	0100	0000127	1110	1000	4400000	000		
SO2900 - SOUTHWEST MOBILE STORAGE,INC	14391612	141.57	RI541850	141.57	0000003654	54.37	0100	0000127	1110	1000	4400000	000		
SO2900 - SOUTHWEST MOBILE STORAGE,INC	14391612	141.57	RI541850	141.57	0000003654	54.38	0100	0000127	1110	1000	4400000	000		

Business Unit Total: \$23,373.90

0100	\$ 4,195.20
6200	\$ 19,178.70
<b>TOTAL:</b>	<b>\$ 23,373.90</b>

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**02300: National School District**

**2018-04-16**

Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
DA0575 - DATTA CONSULTING GROUP	14392073	2,000.00	DCG4NSD 2017-18.2	2,000.00		2,000.00	0100	0000737	8100	5000	5800100	021		

Business Unit Total: \$2,000.00

<b>0100</b>	<b>\$2,000.00</b>
<b>TOTAL:</b>	<b>\$2,000.00</b>

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02300: National School District

2018-04-17

Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
000000011 - Silvia Loera-Toledo	14392413	81.97	SLT041218	81.97		81.97	0100	6264000	1110	1000	5200000	020		
000000046 - Marc Jonathan Isaacs	14392414	138.37	MJI041318	138.37		138.37	0100	0000100	1110	1000	4300000	900		
000000152 - Maria Vazquez	14392415	81.97	MV041218	81.97		81.97	0100	6264000	1110	1000	5200000	020		
000000263 - Kathrina Mendez	14392416	42.51	KM041218	42.51		42.51	0100	6264000	1110	1000	5200000	020		
AM0100 - AMAZON.COM	14392417	24.94	654988478986	24.94	0000003596	24.94	0100	0000100	1110	1000	4300000	100		
GR0200 - GRAINGER	14392418	151.57	9749620705	151.57	0000003046	151.57	0100	0000660	0000	8100	4300000	057		
HA1525 - HAWTHORNE POWER SYSTEMS	14392419	666.00	SS100110684	166.50	0000002441	166.50	0100	0982000	0000	3600	4400000	038		
HA1525 - HAWTHORNE POWER SYSTEMS	14392419	666.00	SS100110685	166.50	0000002441	166.50	0100	0982000	0000	3600	4400000	038		
HA1525 - HAWTHORNE POWER SYSTEMS	14392419	666.00	SS100110686	166.50	0000002441	166.50	0100	0982000	0000	3600	4400000	038		
HA1525 - HAWTHORNE POWER SYSTEMS	14392419	666.00	SS100110687	166.50	0000002442	166.50	0100	0983000	5001	3600	4400000	038		
KE0150 - KEENAN & ASSOCIATES	14392420	1,237.53	209618	1,237.53		1,237.53	0100	0000667	0000	7200	5450100	000		
MA0100 - Maintex	14392421	51.94	651052-00	51.94	0000003700	51.94	0100	0000660	0000	8100	4300000	057		
NA0076 - NAPA AUTO PARTS	14392422	58.68	3930-186854	58.68	0000003165	58.68	0100	0000660	0000	8100	4300000	057		
PR0050 - PRACTICAL, INC.	14392423	206.96	CT1294340429	206.96		206.96	0100	5640568	0000	3140	5800490	022		
SO0100 - THE SOCO GROUP, INC.	14392424	388.25	0516868-IN	388.25	0000003696	388.25	0100	0000660	0000	8100	4300560	057		
SO1000 - SOUTH BAY COMMUNITY SERVICES	14392425	64,637.52	SBCS NSD PS4ALL 16/17 040518	64,637.52		36,653.93	1200	5210000	0001	1000	5800100	000		
SO1000 - SOUTH BAY COMMUNITY SERVICES	14392425	64,637.52	SBCS NSD PS4ALL 16/17	64,637.52		24,764.65	1200	6105100	0001	1000	5800100	000		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
			040518											
SO1000 - SOUTH BAY COMMUNITY SERVICES	14392425	64,637.52	SBCS NSD PS4ALL 16/17 040518	64,637.52		3,218.94	1200	9024977	7110	1000	5800100	028		
UP0010 - UPS	14392426	14.16	0000VA62 89148	14.16		14.16	0100	0000424	1110	1000	5900300	024		
WI0475 - WILLY'S ELECTRONIC SUPPLY CO	14392427	258.96	1-379933	258.96		258.96	0100	0000660	0000	8100	4300000	057		
XP0200 - Veritiv Operating Company	14392428	413.25	97072317 67	413.25	00000036 94	413.25	0100	0000626	0000	7200	4300990	000		

Business Unit Total: \$68,454.58

0100	\$ 3,817.06
1200	\$ 64,637.52
<b>TOTAL:</b>	<b>\$ 68,454.58</b>



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**02300: National School District**                      **2018-04-18**

Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
0000000158 - Natalia Morales	14393141	82.84	NM041018	82.84		82.84	0100	6264000	1110	1000	5200000	020		
0000000207 - Luz Vicario	14393142	109.00	LV031318	109.00		109.00	0100	0000460	0000	2700	5200500	600		
AM0100 - AMAZON.COM	14393143	1,122.26	75456968 4484	122.13	00000035 67	9.24	0100	6500000	5001	3120	4300000	022		
AM0100 - AMAZON.COM	14393143	1,122.26	75456968 4484	122.13	00000035 67	10.72	0100	6500000	5001	3120	4300000	022		
AM0100 - AMAZON.COM	14393143	1,122.26	75456968 4484	122.13	00000035 67	10.73	0100	6500000	5001	3120	4300000	022		
AM0100 - AMAZON.COM	14393143	1,122.26	75456968 4484	122.13	00000035 67	11.81	0100	6500000	5001	3120	4300000	022		
AM0100 - AMAZON.COM	14393143	1,122.26	75456968 4484	122.13	00000035 67	13.96	0100	6500000	5001	3120	4300000	022		
AM0100 - AMAZON.COM	14393143	1,122.26	75456968 4484	122.13	00000035 67	14.45	0100	6500000	5001	3120	4300000	022		
AM0100 - AMAZON.COM	14393143	1,122.26	75456968 4484	122.13	00000035 67	15.37	0100	6500000	5001	3120	4300000	022		
AM0100 - AMAZON.COM	14393143	1,122.26	75456968 4484	122.13	00000035 67	16.53	0100	6500000	5001	3120	4300000	022		
AM0100 - AMAZON.COM	14393143	1,122.26	75456968 4484	122.13	00000035 67	19.32	0100	6500000	5001	3120	4300000	022		
AM0100 - AMAZON.COM	14393143	1,122.26	46848756 7468	17.98	00000036 16	17.98	0100	0980100	1110	1000	4300000	000		
AM0100 - AMAZON.COM	14393143	1,122.26	46899594 4667	35.30	00000036 16	35.30	0100	0980100	1110	1000	4300000	000		
AM0100 - AMAZON.COM	14393143	1,122.26	78757484 8378	232.41	00000036 16	31.82	0100	0980100	1110	1000	4300000	000		
AM0100 - AMAZON.COM	14393143	1,122.26	78757484 8378	232.41	00000036 16	200.59	0100	0980100	1110	1000	4300000	000		
AM0100 - AMAZON.COM	14393143	1,122.26	49834943 4558	25.33	00000036 17	11.74	0100	6500000	5001	3120	4300000	022		
AM0100 - AMAZON.COM	14393143	1,122.26	49834943 4558	25.33	00000036 17	13.59	0100	6500000	5001	3120	4300000	022		
AM0100 - AMAZON.COM	14393143	1,122.26	77398349 4943	83.16	00000036 20	83.16	0100	0000660	0000	8100	4300000	057		
AM0100 - AMAZON.COM	14393143	1,122.26	77357793 9993	37.61	00000036 63	37.61	0100	6500000	5001	2100	4300000	022		
AM0100 - AMAZON.COM	14393143	1,122.26	45436967 7538	32.80	00000036 65	32.80	0100	0000424	0000	2100	4300000	024		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
AM0100 - AMAZON.COM	14393143	1,122.26	ADJ 4380576C M-02Q8Q	-0.80		-0.80	0100	6500000	5001	3120	4300000	022		
AM0100 - AMAZON.COM	14393143	1,122.26	65833545 3634	304.43	00000036 78	304.43	0100	0980100	1110	1000	4300000	000		
AM0100 - AMAZON.COM	14393143	1,122.26	46358695 8967	59.98	00000036 81	59.98	0100	6500000	5001	2100	5200000	022		
AM0100 - AMAZON.COM	14393143	1,122.26	96468568 6957	14.98	00000037 14	14.98	0100	0980000	1110	1000	4300000	800		
AM0100 - AMAZON.COM	14393143	1,122.26	45398594 3769	34.78	00000037 12	34.78	0100	0980000	1110	1000	4300000	800		
AM0100 - AMAZON.COM	14393143	1,122.26	74634675 6443	57.61	00000036 38	57.61	0100	6500000	5770	1190	4300000	022		
AM0100 - AMAZON.COM	14393143	1,122.26	43648645 5734	8.98	00000036 90	8.98	0100	0000623	0000	7200	4300000	000		
AM0100 - AMAZON.COM	14393143	1,122.26	44395493 5694	16.34	00000037 14	16.34	0100	0980000	1110	1000	4300000	800		
AM0100 - AMAZON.COM	14393143	1,122.26	85894564 3938	39.24	00000036 97	39.24	0100	6500000	5001	2100	4300000	022		
CH0800 - RADY CHILDREN'S HOSPITAL	14393145	32,985.50	CT0417 1033	32,985.50		16,189.47	0100	0000900	0000	3140	5800000	022		
CH0800 - RADY CHILDREN'S HOSPITAL	14393145	32,985.50	CT0417 1033	32,985.50		16,796.03	0100	0000500	1110	3140	5800000	022		
CU0100 - CULVER-NEWLIN	14393146	326.70	21716	326.70	00000035 73	326.70	0100	0000903	1110	1000	4300000	000		
DE1015 - DEPARTMENT OF JUSTICE	14393147	2,188.00	294213	2,188.00	00000026 77	1,000.00	0100	0000620	0000	7200	5800710	030		
DE1015 - DEPARTMENT OF JUSTICE	14393147	2,188.00	294213	2,188.00		1,188.00	0100	0000620	0000	7200	5800710	030		
DI0600 - DIXIELINE LUMBER & HOME CENTER	14393148	60.15	09-0152515	60.15	00000037 19	60.15	0100	0000660	0000	8100	4300000	057		
FO0301 - FOLLETT LIBRARY RESOURCES	14393149	841.73	2228414A	841.73	00000036 52	841.73	0100	0980110	1110	1000	4200000	000		
GR0200 - GRAINGER	14393150	28.34	97532784 32	28.34	00000030 46	28.34	0100	0000660	0000	8100	4300000	057		
HA0100 - HARBOR FREIGHT TOOLS	14393151	121.14	838798	121.14	00000032 76	121.14	0100	0000660	0000	8100	4300000	057		
IN0390 - INTERPRETERS UNLIMITED	14393152	200.00	CT3030 135576	200.00		200.00	0100	6500000	5770	1110	5800000	022		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Func	Object	Site	Op Unit	PY
JA0710 - JANUS CORPORATION	14393153	2,352.00	36216	2,352.00	0000003667	2,352.00	0100	0000660	0000	8100	5600150	057		
KO161 - Konica Minolta Premier Finance	14393154	1,336.46	68254455	166.39	2793-1	166.39	0100	1100699	1110	1000	5600200	888		
KO161 - Konica Minolta Premier Finance	14393154	1,336.46	68264702	1,170.07	0000003009	284.00	0100	1100699	1110	1000	5600200	111		
KO161 - Konica Minolta Premier Finance	14393154	1,336.46	68264702	1,170.07		886.07	0100	1100699	1110	1000	5600200	111		
OF0075 - OFFICE DEPOT	14393155	969.24	123497268001	93.59	0000003688	5.67	0100	0000615	0000	7100	4300000	010		
OF0075 - OFFICE DEPOT	14393155	969.24	123497268001	93.59	0000003688	6.30	0100	0000615	0000	7100	4300000	010		
OF0075 - OFFICE DEPOT	14393155	969.24	123497268001	93.59	0000003688	7.60	0100	0000615	0000	7100	4300000	010		
OF0075 - OFFICE DEPOT	14393155	969.24	123497268001	93.59	0000003688	14.13	0100	0000615	0000	7100	4300000	010		
OF0075 - OFFICE DEPOT	14393155	969.24	123497268001	93.59	0000003688	59.89	0100	0000615	0000	7100	4300000	010		
OF0075 - OFFICE DEPOT	14393155	969.24	123508073001	465.40	0000003691	102.21	0100	0000615	0000	7100	4300000	010		
OF0075 - OFFICE DEPOT	14393155	969.24	123508073001	465.40	0000003691	102.21	0100	0000615	0000	7100	4300000	010		
OF0075 - OFFICE DEPOT	14393155	969.24	123508073001	465.40	0000003691	102.21	0100	0000615	0000	7100	4300000	010		
OF0075 - OFFICE DEPOT	14393155	969.24	123508073001	465.40	0000003691	158.77	0100	0000615	0000	7100	4300000	010		
OF0075 - OFFICE DEPOT	14393155	969.24	125145144001	40.44	0000003722	40.44	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393155	969.24	125145152001	369.81	0000003722	1.78	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393155	969.24	125145152001	369.81	0000003722	2.69	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393155	969.24	125145152001	369.81	0000003722	2.81	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393155	969.24	125145152001	369.81	0000003722	2.89	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393155	969.24	125145152001	369.81	0000003722	4.91	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393155	969.24	125145152001	369.81	0000003722	5.34	0100	0000620	0000	7200	4300000	030		

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OF0075 - OFFICE DEPOT	14393155	969.24	12514515 2001	369.81	00000037 22	7.05	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393155	969.24	12514515 2001	369.81	00000037 22	8.55	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393155	969.24	12514515 2001	369.81	00000037 22	8.55	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393155	969.24	12514515 2001	369.81	00000037 22	10.26	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393155	969.24	12514515 2001	369.81	00000037 22	10.81	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393155	969.24	12514515 2001	369.81	00000037 22	11.64	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393155	969.24	12514515 2001	369.81	00000037 22	13.46	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393155	969.24	12514515 2001	369.81	00000037 22	13.46	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393155	969.24	12514515 2001	369.81	00000037 22	13.79	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393155	969.24	12514515 2001	369.81	00000037 22	15.44	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393155	969.24	12514515 2001	369.81	00000037 22	16.03	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393155	969.24	12514515 2001	369.81	00000037 22	17.63	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393155	969.24	12514515 2001	369.81	00000037 22	18.17	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393155	969.24	12514515 2001	369.81	00000037 22	19.81	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393155	969.24	12514515 2001	369.81	00000037 22	164.74	0100	0000620	0000	7200	4300000	030		
RG0200 - RGC General Engineering, Inc.	14393156	39,072.00	2466	39,072.00	00000036 25	39,072.00	0100	8150100	0000	8500	6170000	057		
SA1200 - SAN DIEGO GAS & ELECTRIC	14393157	93.75	MT102 8019 213 602 4 041118	93.75		93.75	0100	0000665	0000	8100	5500100	000		
SA1200 - SAN DIEGO GAS & ELECTRIC	14393158	4,695.62	MT102 8019 205 888 9 041018	4,695.62		4,695.62	0100	0000665	0000	8100	5500100	000		
SH0300 - SHERWIN-WILLIAMS - STORE 8171	14393159	32.19	8584-8	32.19	00000037 17	32.19	0100	0000660	0000	8100	4300000	057		

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Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
TE0110 - Technology in Education	14393160	152,675.98	0854	152,675.98	0000003629	-4,000.00	0100	0000127	1110	1000	4400000	000		
TE0110 - Technology in Education	14393160	152,675.98	0854	152,675.98	0000003629	808.20	0100	0000127	1110	1000	4400000	000		
TE0110 - Technology in Education	14393160	152,675.98	0854	152,675.98	0000003629	4,000.00	0100	0000127	1110	1000	4400000	000		
TE0110 - Technology in Education	14393160	152,675.98	0854	152,675.98	0000003629	4,500.00	0100	0000127	1110	1000	4400000	000		
TE0110 - Technology in Education	14393160	152,675.98	0854	152,675.98	0000003629	6,557.63	0100	0000127	1110	1000	4400000	000		
TE0110 - Technology in Education	14393160	152,675.98	0854	152,675.98	0000003629	7,702.20	0100	0000127	1110	1000	4400000	000		
TE0110 - Technology in Education	14393160	152,675.98	0854	152,675.98	0000003629	8,177.40	0100	0000127	1110	1000	4400000	000		
TE0110 - Technology in Education	14393160	152,675.98	0854	152,675.98	0000003629	9,072.00	0100	0000127	1110	1000	4400000	000		
TE0110 - Technology in Education	14393160	152,675.98	0854	152,675.98	0000003629	35,507.09	0100	0000127	1110	1000	4400000	000		
TE0110 - Technology in Education	14393160	152,675.98	0854	152,675.98	0000003629	38,092.95	0100	0000127	1110	1000	4400000	000		
TE0110 - Technology in Education	14393160	152,675.98	0854	152,675.98	0000003629	42,258.51	0100	0000127	1110	1000	4400000	000		
TO0115 - TOSHIBA FINANCIAL SERVICES	14393161	200.08	354740243	200.08	0000002233	200.08	0100	1100699	1110	1000	5600200	225		
WI0475 - WILLY'S ELECTRONIC SUPPLY CO	14393162	55.81	1-380034	55.81	0000003707	55.81	0100	0000660	0000	8100	4300000	057		

Business Unit Total: \$239,548.79

0100	\$ 239,548.79
<b>TOTAL:</b>	<b>\$ 239,548.79</b>

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02300: National School District

2018-04-19

Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
0000000344 - Gisela Marable	14393694	42.51	GM041218	42.51		42.51	0100	6264000	1110	1000	5200000	020		
DE0550 - Maria DaVenza Tillmans	14393695	600.00	CT3434 41018	600.00		600.00	0100	0980000	1110	1000	5800000	200		
LA0500 - LAKESHORE LEARNING MATERIALS	14393696	520.91	44858204 18	520.91	00000037 11	520.91	0100	0980000	1110	1000	4300000	800		
OF0075 - OFFICE DEPOT	14393697	55.05	12514495 4001	16.30	00000037 22	16.30	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393697	55.05	12514514 7001	1.81	00000037 22	1.81	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393697	55.05	12514515 3001	10.86	00000037 22	10.86	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393697	55.05	12514515 4003	9.78	00000037 22	9.78	0100	0000620	0000	7200	4300000	030		
OF0075 - OFFICE DEPOT	14393697	55.05	12514515 2001	16.30	00000037 22	16.30	0100	0000620	0000	7200	4300000	030		
PR0900 - PRO-ED, INC.	14393698	160.60	2701231	160.60	00000035 50	160.60	0100	6500000	5001	3120	4300000	022		
SC0304 - SCHOLASTIC BOOK CLUBS	14393699	227.00	23619375	227.00	00000037 13	9.00	0100	0980000	1110	1000	4200000	800		
SC0304 - SCHOLASTIC BOOK CLUBS	14393699	227.00	23619375	227.00	00000037 13	30.00	0100	0980000	1110	1000	4200000	800		
SC0304 - SCHOLASTIC BOOK CLUBS	14393699	227.00	23619375	227.00	00000037 13	40.00	0100	0980000	1110	1000	4200000	800		
SC0304 - SCHOLASTIC BOOK CLUBS	14393699	227.00	23619375	227.00	00000037 13	40.00	0100	0980000	1110	1000	4200000	800		
SC0304 - SCHOLASTIC BOOK CLUBS	14393699	227.00	23619375	227.00	00000037 13	108.00	0100	0980000	1110	1000	4200000	800		
SC0805 - SCHOOL HEALTH CORP.	14393700	1,995.08	3425247-00	1,995.08	00000036 93	1,995.08	0100	0000626	0000	7200	4300990	000		
SU0125 - SUPPLYMASTER, INC.	14393701	1,816.56	66890	1,816.56	00000034 42	1,816.56	0100	0000626	0000	7200	4300990	000		
WE1390 - WESTERN ENVIRONMENTAL & SAFETY	14393702	1,482.50	18-224	1,482.50	00000037 45	1,482.50	0100	0000660	0000	8100	5800000	057		

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Business Unit Total: \$6,900.21

0100	\$6,900.21
<b>TOTAL:</b>	<b>\$6,900.21</b>

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02300: National School District

2018-04-20

Vendor	Warrant	Warrant Amount	Invoice Id	Invoice Amount	PO Id	Distribution Amount	Fund	Resource	Goal	Funct	Object	Site	Op Unit	PY
0000000037 - AMERICAN FIDELITY ADMINISTRATIVE	14394331	608.30	CT3317 29118	608.30		608.30	0100	0000623	0000	7200	5800000	000		
0000000038 - David Mahlow	14394332	137.58	DM030918	62.18		62.18	0100	6500000	5750	1110	4300000	022		
0000000038 - David Mahlow	14394332	137.58	DM040618	75.40		75.40	0100	3310000	5750	1110	4300000	022		
0000000067 - Jennifer Reynolds	14394333	196.53	JR031818	196.53		196.53	0100	0100200	1110	1000	4300000	200		
0000000177 - Kimberly Carnagey	14394334	39.63	KC040618	39.63		39.63	0100	0100196	1110	1000	4300000	200		
0000000231 - Elizabeth Fogaren	14394335	253.43	EF031318	253.43		253.43	0100	6500000	5001	2100	5200000	022		
0000000332 - Patty Pyle	14394336	35.36	PP041918	35.36		35.36	0100	3310000	5750	1130	4300000	022		
0000000345 - Norma Lisa Casas	14394337	354.25	NLC04131 8	354.25		354.25	0100	6500000	5770	1110	5200500	022		
0000000346 - J. Antonio Perez	14394338	100.00	AP041218	100.00		100.00	0100	0982000	0000	3600	5200000	038		
CO0110 - COMMERCIAL GAS APPLIANCE	14394339	135.00	15910	135.00	00000037 46	135.00	1300	5310000	0000	3700	5600000	000		
LI0890 - Literature Comes to Life	14394340	795.00	CT3472 218177	795.00		795.00	0100	3010100	1110	1000	5800000	300		
SC0925 - SCOTTISH RITE CATHEDRAL OF	14394341	1,669.00	I10311	1,669.00		1,669.00	0100	0000623	0000	7200	5800000	000		
SO0100 - THE SOCO GROUP, INC.	14394342	1,095.93	0519541- IN	1,095.93	00000036 96	1,095.93	0100	0000660	0000	8100	4300560	057		
ST0585 - STAPLES BUSINESS ADVANTAGE	14394343	861.78	33731850 26	255.95	00000036 74	59.25	0100	0000440	0000	2420	4300000	020		
ST0585 - STAPLES BUSINESS ADVANTAGE	14394343	861.78	33731850 26	255.95	00000036 74	59.25	0100	0000440	0000	2420	4300000	020		
ST0585 - STAPLES BUSINESS ADVANTAGE	14394343	861.78	33731850 26	255.95	00000036 74	60.30	0100	0000440	0000	2420	4300000	020		
ST0585 - STAPLES BUSINESS ADVANTAGE	14394343	861.78	33731850 26	255.95	00000036 74	77.15	0100	0000440	0000	2420	4300000	020		
ST0585 - STAPLES BUSINESS ADVANTAGE	14394343	861.78	33749180 56	287.93	00000037 09	2.16	0100	0980000	1110	1000	4300000	800		



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ST0585 - STAPLES BUSINESS ADVANTAGE	14394343	861.78	3374918056	287.93	0000003709	31.54	0100	0980000	1110	1000	4300000	800		
ST0585 - STAPLES BUSINESS ADVANTAGE	14394343	861.78	3374918056	287.93	0000003709	48.15	0100	0980000	1110	1000	4300000	800		
ST0585 - STAPLES BUSINESS ADVANTAGE	14394343	861.78	3374918056	287.93	0000003709	77.16	0100	0980000	1110	1000	4300000	800		
ST0585 - STAPLES BUSINESS ADVANTAGE	14394343	861.78	3374918056	287.93	0000003709	128.92	0100	0980000	1110	1000	4300000	800		
ST0585 - STAPLES BUSINESS ADVANTAGE	14394343	861.78	3374918057	317.90	0000003726	77.16	0100	0000440	0000	2420	4300000	020		
ST0585 - STAPLES BUSINESS ADVANTAGE	14394343	861.78	3374918057	317.90	0000003726	80.24	0100	0000440	0000	2420	4300000	020		
ST0585 - STAPLES BUSINESS ADVANTAGE	14394343	861.78	3374918057	317.90	0000003726	80.25	0100	0000440	0000	2420	4300000	020		
ST0585 - STAPLES BUSINESS ADVANTAGE	14394343	861.78	3374918057	317.90	0000003726	80.25	0100	0000440	0000	2420	4300000	020		
SW0100 - SWEETWATER AUTHORITY	14394344	14,830.20	MT302524-0341-0	14,830.20		14,404.88	0100	0000665	0000	8100	5500300	000		
SW0100 - SWEETWATER AUTHORITY	14394344	14,830.20	MT302524-0341-0	14,830.20		284.96	0100	9010377	0001	8100	5500300	000		
SW0100 - SWEETWATER AUTHORITY	14394344	14,830.20	MT302524-0341-0	14,830.20		140.36	0100	6500000	5001	8100	5500300	022		
TO0115 - TOSHIBA FINANCIAL SERVICES	14394345	260.98	355175223	260.98	0000002229	260.98	0100	1100699	1110	1000	5600200	222		
VE0055 - VERIZON WIRELESS	14394346	41.16	9805448072	41.16		41.16	0100	0000665	0000	8100	5900100	000		

Business Unit Total: \$21,414.13

<b>0100</b>	<b>\$ 21,279.13</b>
<b>1300</b>	<b>\$ 135.00</b>
<b>TOTAL:</b>	<b>\$ 21,414.13</b>

**REVOLVING CASH FUND - BUSINESS I**  
**April 1, 2018 through April 30, 2018**

<b>DATE</b>	<b>NUM.</b>	<b>PAYEE</b>	<b>DESCRIPTION</b>	<b>AMT</b>
4/3/18	5328	Rosa de la Mora	Emergency Payroll	245.30
4/30/18	Bank Fee	Union Bank	Check Image Fee	3.00
<b>TOTAL</b>				<b>\$248.30</b>

**REVOLVING CASH FUND - BUSINESS II**  
**April 1, 2018 through April 30, 2018**

DATE	NUM.	PAYEE	DESCRIPTION	AMOUNT
4/30/18	Bank Fee	Union Bank	Check Image Fee	3.00
<b>TOTAL</b>				<b>\$3.00</b>

Petty cash funds are maintained in Business Services, Family Resource Center and Service Center for the purchase of office and maintenance supplies.



**NATIONAL SCHOOL DISTRICT  
PURCHASING CARD EXPENSES  
MARCH 2018 - BOARD REPORT**

Account Name	Merchant Name	Amount	Expense Description
BRADY,LEIGHANGELA	MICHAELS.COM	60.91	Frames for Governing Board pictures.
BRADY,LEIGHANGELA	NALEO EDUCATIONAL FUND	600.00	Registration- NALEO 35th Annual Conference in Phoenix, AZ on June 21-23, 2018- Barbara Avalos
BRADY,LEIGHANGELA	SOUTHWEST AIRLINES	181.96	Airfare- NALEO 35th Annual Conference in Phoenix, AZ on June 21-23, 2018- Barbara Avalos
BRADY,LEIGHANGELA	WALDORF	604.50	Hotel- NALEO 35th Annual Conference in Phoenix, AZ on June 21-23, 2018- Barbara Avalos
BRADY,LEIGHANGELA	STARBUCKS STORE 19802	33.90	Refreshments- Executive Cabinet Coffee/Chat at Las Palmas School on March 5, 2018.
BRADY,LEIGHANGELA	STARBUCKS STORE 19802	33.90	Refreshments- Staff Meeting at John Otis School on March 6, 2018.
BRADY,LEIGHANGELA	SHERATON SD MARINA VAL	35.00	Parking- Masters in Governance workshop on March 9, 2018 in San Diego- Leighangela Brady
BRADY,LEIGHANGELA	MSFT * E02005ES9F	4.05	Monthly charge for one Office 365/SharePoint license.
BRADY,LEIGHANGELA	STARBUCKS STORE 19802	33.90	Refreshments- Executive Cabinet Coffee/Chat at John Otis School on March 12, 2018.
BRADY,LEIGHANGELA	SDCSBA	1,700.00	Registration- Leadership Team and Governing Board Members to attend the Annual Honoring Our Own Dinner on April 27, 2018 in San Diego.
<b>BRADY,LEIGHANGELA Total</b>		<b>3,288.12</b>	
CARSON,CHRISTOPHER B	OFFICE DEPOT #0963	138.10	Toner Cartridge for teacher, Samantha Thomas at John Otis.
CARSON,CHRISTOPHER B	OFFICE DEPOT #0963	63.52	Office Supplies- A-Z dividers for binders for board meeting presentation.
<b>CARSON,CHRISTOPHER B Total</b>		<b>201.62</b>	
DE LE PENA, FELIPE	AMAZON.COM	-64.98	Refund- Stacking Stools for a classroom remodel that were received broken and, shipped back.
DE LE PENA, FELIPE	WAL-MART #5023	206.51	Attendance Incentive- School Supplies (crayons, pencils, chalk) and, playground equipment (volleyballs) purchased for perfect attendance ceremony.
DE LE PENA, FELIPE	SMARTNFINAL34710803476	29.47	Healthy Snacks- Fruit snacks purchased for A/R Movie for students.
DE LE PENA, FELIPE	AMAZON.COM	126.94	Balance replacement ball for chairs for a classroom. Plastic storage containers for storing classroom items. Tab file folders for office use in CUM folders.
DE LE PENA, FELIPE	LITTLE CAESARS 1250-00	70.69	Attendance Incentive- Pizza for the Perfect Attendance Party for the classroom winner.

<b>DE LE PENA, FELIPE Total</b>		368.63	
DENEGRI,ALFONSO	AMAZON MKTPLACE PMTS W	777.13	Project-based learning books for Teachers (K-6th) for their Professional Development and, rainbow book markers.
DENEGRI,ALFONSO	SSI*EPSCC	500.00	ELA Test books for all 3rd grade classes.
DENEGRI,ALFONSO	SSI*EPSCC	396.37	ELA Test books for all 3rd grade classes.
DENEGRI,ALFONSO	THE UPS STORE 0250	43.72	Postage for a return label of Triumph Learning books being returned.
DENEGRI,ALFONSO	AMAZON MKTPLACE PMTS	40.51	Classroom Supplies- Mini highlighters for teacher-use with their project-based learning books.
DENEGRI,ALFONSO	AMAZON MKTPLACE PMTS	-73.21	Refund/Return- Barcode scanner for our check-in system.
DENEGRI,ALFONSO	TEACHERSPAYTEACHERS.CO	115.00	Internet standard Boom Cards for extra practice for 3rd grade students.
DENEGRI,ALFONSO	HOUZZ INC.	157.30	Compost Bin for our school garden.
DENEGRI,ALFONSO	AMAZON MKTPLACE PMTS	<u>109.95</u>	Classroom SuppliesHeadphones for SBAC testing for 3rd-6th grade.
<b>DENEGRI,ALFONSO Total</b>		2,066.77	
HANSEN,JON	SMARTNFINAL34710803476	<u>39.51</u>	Supplies for Super Salad Bar- Plates, Forks and, fruit.
<b>HANSEN,JON Total</b>		39.51	
HAYES,BEVERLY A	OFFICE DEPOT #0963	-65.18	Credit- Certificate paper purchased for Read Across America - not needed and returned
HAYES,BEVERLY A	OFFICE DEPOT #0963	28.79	Office Supplies- Pens to use to sign certificates and, erasable/reusable binder tabs
HAYES,BEVERLY A	STAPLES DIRECT	54.68	Office Supplies- Waste cartridge for Principal's printer and, neon stickers for school visitors.
HAYES,BEVERLY A	SCHOLASTIC READING CLU	384.00	Student Incentive- Books for students who met their second trimester Accelerated Reader goals.
HAYES,BEVERLY A	OFFICE DEPOT #0963	<u>69.25</u>	Office Supplies- Paper for Wise Owl Ways slips, incentive stickers for students, calendar and, legal pads.
<b>HAYES,BEVERLY A Total</b>		471.54	
HERNANDEZ,DEBORAH	SMARTNFINAL34710803476	79.44	Healthy Snacks for District Office Meetings.
HERNANDEZ,DEBORAH	INTL LITERACY ASSOC	<u>249.00</u>	Registration- International Literacy Association March 16-17, 2018 in San Diego- Lourdes Cabrales
<b>HERNANDEZ,DEBORAH Total</b>		328.44	
HERNANDEZ,LETICIA	SAN DIEGO COUNTY SUPER	100.00	Registration- Job Fair 2018 on 4/14/18 at Point Loma Nazarene Liberty Station San Diego- Leticia Hernandez
HERNANDEZ,LETICIA	CRAIGSLIST.ORG	<u>70.00</u>	Job posting for Child Nutrition Services under education/teaching and, food/beverage/hospitality.
<b>HERNANDEZ,LETICIA Total</b>		170.00	

JAMESON,PAULA	SMARTNFINAL34710803476	32.65	Healthy Snacks for Staff Development.
JAMESON,PAULA	SMARTNFINAL34710803476	96.91	Refreshments- First LCAP Committee Meeting on March 1, 2018
JAMESON,PAULA	RLI*RENAISSANCE LEARN	90.00	Star 360 Licenses- Olivewood School; 12 students
JAMESON,PAULA	RLI*RENAISSANCE LEARN	22.50	Star 360 Licenses- Ira Harbison; 3 students
JAMESON,PAULA	RLI*RENAISSANCE LEARN	22.50	Star 360 Licenses- Olivewood School; 3 students
JAMESON,PAULA	RLI*RENAISSANCE LEARN	12.90	Star 360 Licenses- Central School; 2 students
JAMESON,PAULA	SMARTNFINAL34710803476	68.78	Refreshments- District Parent Advisory Committee (DPAC) Meeting.
JAMESON,PAULA	CALIFORNIA SCHOOL EMPL	-109.00	Refund- Registration CSEA 21st Annual Paraeducator Conference 2018 2/20-2/22/18 in Ontario, CA.- Yolanda Ornelas- No Show
JAMESON,PAULA	CALIFORNIA SCHOOL EMPL	-109.00	Refund- Registration- CSEA 21st Annual Paraeducator Conference 2018 2/20-2/22/18 in Ontario, CA.- Mayra Gonzales
JAMESON,PAULA	RLI*RENAISSANCE LEARN	12.90	Star 360 Licenses- John Otis School; 2 Students
JAMESON,PAULA	RLI*RENAISSANCE LEARN	6.45	Star 360 Licenses- Rancho De La Nación; 1 Student
JAMESON,PAULA	RLI*RENAISSANCE LEARN	12.90	Star 360 Licenses- Lincoln Acres; 2 Students
JAMESON,PAULA	RLI*RENAISSANCE LEARN	135.45	Star 360 Licenses- Central School; 21 Students
JAMESON,PAULA	RLI*RENAISSANCE LEARN	6.45	Star 360 Licenses- Las Palmas; 1 Student
JAMESON,PAULA	SOUTHWEST AIRLINES	<u>216.96</u>	Airfare- 2018 National MTSS Professional Learning Institute in July 24-26 in Sacramento, CA- Meghann O'Connor
<b>JAMESON,PAULA Total</b>		<b>519.35</b>	
LAWSON,CHARMAINE	RALPHS #0077	11.36	Healthy Snacks for children during a nutrition parenting class.
LAWSON,CHARMAINE	AMAZON MKTPLACE PMTS	<u>25.21</u>	Safety appliance lock to be used in the classroom and cowbells.
<b>LAWSON,CHARMAINE Total</b>		<b>36.57</b>	
MARTINEZ,RAUL	OFFICE DEPOT #0963	153.24	Office Supplies for Facilities Inventory Project- Paper, Pens and, Dividers
MARTINEZ,RAUL	PURELAND SUPPLY LLC	116.50	A/V Supplies- Promethean Cable for EI Toyon Room 17.
MARTINEZ,RAUL	BEST BUY 00001883	32.46	A/V Supplies- Promethean Cable for Apple Computer.
MARTINEZ,RAUL	HOLIDAY INNS	418.96	Hotel- National Locksmith Institute March 5-9, 2018 in Corona, CA.- Esteban Diaz
MARTINEZ,RAUL	ALLIED ELECTRONICS INC	25.54	Mechanic Supplies- Mini Iso Automobile Sensor
MARTINEZ,RAUL	OFFICE DEPOT #2210	155.79	Office Supplies for Facilities Inventory Project- 8 Reams of Office Paper
MARTINEZ,RAUL	OFFICE DEPOT #2210	218.88	Facilities Inventory Project- Production of 30 Booklets
MARTINEZ,RAUL	PURELAND SUPPLY LLC	<u>126.50</u>	A/V Supplies- Promethean Lamp for Central Room 24
<b>MARTINEZ,RAUL Total</b>		<b>1,247.87</b>	
MELANESE,KATHERINE	AMAZON.COM	605.69	Toner Cartridges for classroom and office printers.
MELANESE,KATHERINE	DEVELOPMENTAL STUDIES	1,004.05	Assessment Materials- SIPPS 2nd Grade Beginning and, Extension Level. 3rd Grade Challenge Level.
MELANESE,KATHERINE	AMAZON MKTPLACE PMTS	28.50	Toner Cartridge for classroom printer.
MELANESE,KATHERINE	NATIONAL CITY TROPHY	71.78	Trophies for jog-a-thon.
MELANESE,KATHERINE	DEVELOPMENTAL STUDIES	274.36	Assessment Materials- Spelling-Sound Cards, Teacher Manual, and SIPPS, level 3 kit.

MELANESE,KATHERINE	DEVELOPMENTAL STUDIES	-255.56	Refund for SIPPS Spelling-Sound Cards and,Teacher Manual
<b>MELANESE,KATHERINE Total</b>		<b>1,728.82</b>	
MELLMAN,WILLIAM	AMAZON MKTPLACE PMTS W	48.99	Student Incentive- Free Dress Day Wristbands for attendance, parent involvement and, participation.
<b>MELLMAN,WILLIAM Total</b>		<b>48.99</b>	
O'CONNOR,MEGHANN	SUBWAY 03020419	28.96	Lunch for SARB meeting.
O'CONNOR,MEGHANN	WALMART.COM	162.04	Mini refrigerator for nurse's office at Kimball.
O'CONNOR,MEGHANN	SANDAG	36.00	Bus pass for homeless student #3711037.
O'CONNOR,MEGHANN	SANDAG	36.00	Bus pass for homeless student #3701239.
<b>O'CONNOR,MEGHANN Total</b>		<b>263.00</b>	
OLEA,YVETTE	SUBWAY 03046232	28.95	Dinner for the Governing Board Members for the February 28, 2018 Board meeting.
OLEA,YVETTE	STONE OVEN PLAZA BONIT	44.86	Dinner for the Governing Board Members for the March 14, 2018 Board meeting.
OLEA,YVETTE	AMAZON MKTPLACE PMTS	27.90	Movie "Wonder" for sixth grade teams at Ira Harbison and Olivewood Schools.
OLEA,YVETTE	SAN DIEGO COUNTY SUPER	50.00	Registration- Biliteracy Symposium on May 8, 2018 in San Diego- Barbara Avalos (33.33%)
OLEA,YVETTE	SAN DIEGO COUNTY SUPER	50.00	Registration- Biliteracy Symposium on May 8, 2018 in San Diego- Brian Clapper (33.33%)
OLEA,YVETTE	SAN DIEGO COUNTY SUPER	50.00	Registration- Biliteracy Symposium on May 8, 2018 in San Diego- Maria Dalla (33.34%)
<b>OLEA,YVETTE Total</b>		<b>251.71</b>	
ORENDAIN,ADRIANA	OFFICE DEPOT #5125	244.68	Keyboard Tray for Yvette Olea.
ORENDAIN,ADRIANA	OFFICE DEPOT #5125	306.66	Keyboard Tray for Yvette Olea.
ORENDAIN,ADRIANA	OFFICE DEPOT #0963	81.53	Three self ink stamps for Special Education Department.
ORENDAIN,ADRIANA	WALMART.COM	75.22	Case of Emergency Drinking Water Packs.
ORENDAIN,ADRIANA	GALLS	332.75	Emergency Items- First Responder Kit
<b>ORENDAIN,ADRIANA Total</b>		<b>1,040.84</b>	
RUAN,SONIA	WAL-MART #2291	54.04	Student Incentive- Purchased new movies. Students with perfect attendance and, those who have reached their Accelerated Reader Goals will be invited to watch the Student Incentive- Healthy Snacks for students with perfect attendance and, for those who have reached their Accelerated Reader Goals.
RUAN,SONIA	SMARTNFINAL93610609360	61.98	
<b>RUAN,SONIA Total</b>		<b>116.02</b>	
SANCHEZ,STEVEN	SMARTNFINAL34710803476	35.97	Attendance Incentive- Popcorn party for Kinder classrooms with perfect attendance.
SANCHEZ,STEVEN	AMAZON.COM AMZN.COM/BI	-112.26	Account Credit for books not delivered.

SANCHEZ,STEVEN	SMARTNFINAL34710803476	91.26	Student Incentive- Fruit snacks and capri sun juices for movie party for students who meet their AR goals in grades 3-5.
SANCHEZ,STEVEN	SMARTNFINAL34710803476	108.27	Student Incentive- Capri fruit punch and gummy fruit snacks for movie party for students who meet AR goal.
SANCHEZ,STEVEN	WALMART.COM	14.08	School uniform for student.
SANCHEZ,STEVEN	SMARTNFINAL34710803476	<u>49.86</u>	Attendance Incentive- Fruit snacks and capri juice boxes for students with perfect attendance.
<b>SANCHEZ,STEVEN Total</b>		187.18	
SILVA,ISABEL	OFFICE DEPOT #5125	183.14	Toner Cartridge for the school workroom printer.
SILVA,ISABEL	COURTYARD BY MARRIOTT	340.82	Charge- Incorrect amount charged for the Hotel for the CUE Conference.
SILVA,ISABEL	COURTYARD BY MARRIOTT	-340.82	Refund- Incorrect amount charged for the Hotel for the CUE Conference.
SILVA,ISABEL	OFFICE DEPOT #5125	232.16	Toner Cartridge for language arts specialist printer.
SILVA,ISABEL	COURTYARD BY MARRIOTT	170.41	Hotel- "CUE 2018 Spring Conference" on March 17, 2018 in Palm Springs, CA- Katie Crosbie, Cristina Quiroga and, Ashley Workizer
SILVA,ISABEL	PAYPAL *HOPEKINGTEA	<u>360.00</u>	Registration- "Get Your Teach On National Conference" on June 24-26, 2018 in S.D. - Kathrina Mendez
<b>SILVA,ISABEL Total</b>		945.71	
VICARIO,LUZ S	AMAZON MKTPLACE PMTS	26.48	Ready Common Core Reading Instruction Book.
VICARIO,LUZ S	SCHOLASTIC READING CLU	235.00	Books for 3rd grade- The Lemonade War, Sideways Stories, Magic Tree House
VICARIO,LUZ S	AMAZON MKTPLACE PMTS	33.97	3RD Grade Ready Common Core Reading Instruction Book.
VICARIO,LUZ S	AMAZON MKTPLACE PMTS W	144.33	STEAM Day Supplies- 6PCS Neodymium Bar Magnet
VICARIO,LUZ S	AMAZON MKTPLACE PMTS W	283.47	Blank white dice, book "James and the Giant Peach" and, Ready Common Core Reading Instruction Book.
VICARIO,LUZ S	PARTY CITY	<u>35.65</u>	Theater Camp Supplies- Deco Kit, Glitz Director Board and, Lights Camera Action Sign.
<b>VICARIO,LUZ S Total</b>		758.90	
VINE,BRYAN	LAKESHORE LEARNING MAT	615.38	Kindergarten Instructional Supplies- Alpha-Bots, Numbers photo floor puzzle, vehicle counters, addition match-up and, shape sorting.
VINE,BRYAN	WAL-MART #5023	19.79	Student Incentive- Ice cream sundae supplies for Accelerated Book reading incentive.
VINE,BRYAN	AMAZON MKTPLACE PMTS	62.93	Safety vests for our parent traffic patrol.
VINE,BRYAN	AMAZON MKTPLACE PMTS W	124.15	STEAM Supplies- Glue, toy car gear accessories, building bricks and, electric mini motor.
VINE,BRYAN	THE HOME DEPOT #6634	<u>12.87</u>	Four wooden dowels for the butcher paper dispenser.
<b>VINE,BRYAN Total</b>		835.12	

**Grand Total: 14,914.71**



# **EXHIBIT B**

**May 9, 2018**

# National SD

## Board Policy

### Vision

BP 0000 (a)

#### Philosophy, Goals, Objectives and Comprehensive Plans

**The Governing Board believes that a clearly stated purpose and direction for the district provide the foundation for continuous improvement and accountability. In order to provide a clear focus for district programs, activities and operations, the Governing Board shall adopt a long-range vision that sets direction for the district programs and activities that which is focused on student learning and describes what the Board wants its schools to achieve. focuses on the achievement and well-being of all students and reflects the importance of preparing students for the future academically, professionally, and personally. The vision shall recognize the unique role of students, parents/guardians, staff, and community partners in contributing to a high-quality education for all students. This The district's vision may be incorporated in various documents, including the district's into its mission or purpose statement, philosophy or motto, long-term goals, short-term objectives, and/or comprehensive plans such as the local control and accountability plan (LCAP).**

*(cf. 0100 - Philosophy)*

*(cf. 0200 - Goals for the School District)*

*(cf. 0400 - Comprehensive Plans)*

***(cf. 0460 - Local Control and Accountability Plan)***

*(cf. 9000 - Role of the Board)*

**The Superintendent or designee shall recommend an appropriate process, with clearly defined procedures, timelines, and responsibilities, for establishing, and/or reviewing, and updating the district's vision statements. This process shall include a review of relevant district documents and data including, but not limited to, information about student demographics, student achievement, current programs, and emerging educational issues. The process shall incorporate an analysis and identification of district strengths and areas in which growth is needed. Input shall be solicited from which is inclusive of parents/guardians, students, staff, and community members through methods such as surveys, focus groups, advisory committees, and/or public meetings and forums.**

*(cf. 1220 - Citizen Advisory Committees)*

*(cf. 2230 - Representative and Deliberative Groups)*

*(cf. 6020 - Parent Involvement)*

**The Board shall review the district's vision statements at least every three years or whenever a new Board member or Superintendent joins the district. annually, in conjunction with the**

BP 0000 (b)

**VISION** (continued)

**update to the LCAP, to ensure consistency among all documents that set direction for the district.** Following these reviews, the Board may revise or reaffirm the direction it has established for the district.

The Superintendent or designee shall communicate the district's vision to staff, parents/guardians, and the community **and shall regularly report to the Board regarding district progress toward the vision.**

*(cf. 1113 - District and School Web Sites)*

*(cf. 1100 - Communication with the Public)*

**Board decisions regarding curriculum, policies, the budget, collective bargaining agreements, and other district operations shall be aligned with the district's vision. In addition, the Superintendent or designee shall ensure that staff's implementation of district programs and activities supports attainment of the district's vision.**

**The Superintendent or designee shall regularly report to the Board regarding district progress toward the vision.**

*(cf. 0500 - Accountability)*

**Legal Reference:****EDUCATION CODE**

**52060-52077 Local control and accountability plan**

**Management Resources:****CSBA PUBLICATIONS**

**The School Board Role in Creating the Conditions for Student Achievement: A Review of the Research, May 2017**

**Governing to Achieve: A Synthesis of Research on School Governance to Support Student Achievement, August 7, 2014**

**Defining Governance, Issue 4: Governance Decisions, Governance Brief, June 2014**

**Defining Governance, Issue 3: Governance Practices, Governance Brief, April 2014**

**Maximizing School Board Leadership: Vision, 1996**

**WEB SITES**

CSBA: <http://www.csba.org>

(2/98) 7/17

**Policy Reference UPDATE Service**

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# National SD

## Board Policy

### Philosophy

BP 0100(a)

#### Philosophy, Goals, Objectives and Comprehensive Plans

~~As part of its responsibility~~ **In order** to establish **and support** a guiding vision for the district, the Governing Board shall develop, **articulate**, and regularly review **a an overarching** set of fundamental principles which describes the district's **core** beliefs, values, **and** ~~or~~ tenets. The Board and district staff shall incorporate ~~this philosophy in these principles into~~ all ~~district~~ programs, ~~and~~ activities, **and operations of the district.**

*(cf. 0000 - Vision)*

*(cf. 0200 - Goals for the School District)*

***(cf. 0460 - Local Control and Accountability Plan)***

*(cf. 9000 - Role of the Board)*

It is the philosophy of the district that:

1. All students can learn and succeed.
2. ~~Every student in the district, regardless of gender, special needs, or social, ethnic, language or economic background has a right to a high quality education that challenges the student to achieve to his/her fullest potential.~~ **Every student should have an opportunity to receive a quality education regardless of his/her social, cultural, or economic background.**

***(cf. 0410 - Nondiscrimination in District Programs and Activities)***

3. **Every student in the district has a right to be free from discrimination, harassment, intimidation, and bullying, as prohibited by law or district policy.**
- ~~3.~~ 4. The future of our nation and community depends on students possessing the skills to be lifelong learners, **collaborative and creative problem solvers**, and effective, contributing members of **a global and technologically advanced** society.
5. **Highly skilled and dedicated teachers and educational support staff have the capacity to guide students toward individual achievement and growth, and have a direct and powerful influence on student learning and life experiences.**
- ~~4.~~ 6. A safe, nurturing environment **and positive school climate are** ~~is~~ necessary for learning, **academic achievement, and student development.**

BP 0100(b)

## PHILOSOPHY (continued)

*(cf. 5131.2 - Bullying)*

*(cf. 5137 - Positive School Climate)*

**5. 7.** Parents/guardians have a right and an obligation to ~~participate~~ **be engaged** in their child's ~~schooling~~ **education and to be involved in the intellectual, physical, emotional, and social development and well-being of their child.**

*(cf. 6020 - Parent Involvement)*

**6. 8.** The **needs of the whole child must be addressed, as the** ability of children to learn is affected by social, health, and economic conditions and other factors outside the classroom.

**7. 9.** Early identification of ~~student~~ learning and behavioral difficulties **and timely and appropriate support and intervention** contribute to student success.

**8. 10.** Students and staff ~~respond positively to~~ **are encouraged and motivated by** high expectations and recognition for their accomplishments.

**9. 11.** ~~Continuous~~ School improvement is ~~necessary~~ **a dynamic process requiring flexibility and innovation** to meet the needs of students in a changing ~~economy and society~~ **world.**

**12.** **Professional development for the Board and district staff is essential for the growth and success of the district and its students.**

*(cf. 4131 - Staff Development)*

*(cf. 4231 - Staff Development)*

*(cf. 4331 - Staff Development)*

*(cf. 9240 - Board Training)*

**10. 13.** The diversity of the student ~~population~~ **body** and ~~school~~ staff enriches the learning experience ~~for all students,~~ **promotes cultural awareness and acceptance, and serves as a model for citizenship in a global society.**

**11. 14.** ~~A highly skilled and dedicated staff has a direct and powerful influence on students' lives and learning.~~ **A common set of norms and protocols is crucial to effective governance.**

**12. 15.** ~~A high level of~~ **Communication, trust, respect, collaboration,** and teamwork **strengthen the relationship** among Board members and **between** the **Board and** Superintendent, **and** contributes to **the** effectiveness of ~~the decision-making~~ **governance team.**

BP 0100(c)

**PHILOSOPHY** (continued)

**13. 16.** The community provides an essential resource to the educational program and district are inextricably connected partners, wherein the community's engagement in issues that impact the schools enhances the district's programs and student learning.

*(cf. 1000 - Concepts and Roles)*

**14. 17.** Effective Two-way communication with all stakeholders helps build support for the school is essential for establishing continuity, support, and shared goals both within the district and with the surrounding community.

**18.** The Board has a responsibility to advocate on behalf all students, keep current on legislative issues affecting education, and build positive relationships with local, state, and federal representatives.

**19.** A fiscally sound budget which is reflective of the district's vision is imperative to the financial stability of the district and to the attainment of its goals.

**15. 20.** Accountability **Responsibility** for the district's programs and operations is shared by the entire educational community, with the ultimate accountability resting with the Board as the basic embodiment of representative government.

*Legal Reference:*

EDUCATION CODE

51002 Local development of programs based on stated philosophy and goals

51019 Definition of philosophy

**51100-51101 Parental involvement**

*Management Resources:*

CSBA PUBLICATIONS

~~Maximizing School Board Leadership: Vision, 1996~~

**The School Board Role in Creating the Conditions for Student Achievement: A Review of the Research, May 2017**

**Governing to Achieve: A Synthesis of Research on School Governance to Support Student Achievement, August 7, 2014**

**Defining Governance, Issue 2: Governing Commitments, Governance Brief, February 2014**

WEB SITES

**CSBA: <http://www.csba.org>**

**National School Climate Center: <http://schoolclimate.org>**

(11/86 2/98) 7/17

**Policy Reference UPDATE Service**

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# National SD

## Board Policy

### Comprehensive Plans

BP 0400(a)

#### Philosophy, Goals, Objectives and Comprehensive Plans

The Governing Board believes that careful planning is essential to effective implementation of district programs and policies. Comprehensive plans shall identify cohesive strategies for school improvement, and provide stability in district operations, **and be aligned to ensure consistency among district approaches for student academic growth and achievement.**

~~The Superintendent or designee shall develop comprehensive plans for the implementation of the district's vision and goals, on specific policy topics and on other areas as required by law. As appropriate, comprehensive~~ **Comprehensive plans adopted by the district shall include the local control and accountability plan (LCAP) and other plans required by law or determined by the Board to be in the best interest of the district. Such** plans may describe, ~~but not be limited to,~~ anticipated short- and long-term needs, measurable outcomes, priorities, activities, available resources, timelines, staff responsibilities, and strategies for internal and external communications regarding the plan.

*(cf. 0000 - Vision)*

*(cf. 0200 - Goals for the School District)*

*(cf. 0430 - Comprehensive Local Plan for Special Education)*

*(cf. 0440 - District Technology Plan)*

*(cf. 0450 - Comprehensive Safety Plan)*

***(cf. 0460 - Local Control and Accountability Plan)***

*(cf. 0500 - Accountability)*

*(cf. 1112 - Media Relations)*

~~*(cf. 2140 - Evaluation of the Superintendent)*~~

*(cf. 3516 - Emergencies and Disaster Preparedness Plan)*

*(cf. 3543 - Transportation Safety and Emergencies)*

*(cf. 4141.6/4241.6 - Concerted Action/Work Stoppage)*

*(cf. 6171 - Title I Programs)*

~~*(cf. 6190 - Evaluation of the Instructional Program)*~~

*(cf. 7110 - Facilities Master Plan)*

**Comprehensive plans may be subject to review and approval by the Board.**

The process for developing comprehensive plans shall ~~invite~~ **include** broad participation of school and community representatives. Committees may, **and when required by law shall,** be appointed to assist in the development of **such** plans. **District comprehensive plans are subject to review and approval by the Board.** ~~Comprehensive plans shall be available to the public and shall be reviewed at regular intervals as specified within the plan.~~

BP 0400(b)

**COMPREHENSIVE PLANS** (continued)

(cf. 1220 - Citizen Advisory Committees)  
 (cf. 2230 - Representative and Deliberative Groups)  
 (cf. 6020 - Parent Involvement)  
 (cf. 9130 - Board Committees)

~~In addition,~~ School-level plans may be developed to meet the unique circumstances of individual school sites provided that they are consistent with law, ~~district vision,~~ Board policies, **district** administrative regulations, **the district vision, the LCAP,** and **other** districtwide plans. School plans ~~may~~ **shall** be subject to review and approval of the Superintendent or designee ~~and/or the Board,~~ **except when law or Board policy requires Board approval of the plan.**

(cf. 0420 - School Plans/Site Councils)

Comprehensive plans shall be available to the public, and shall be reviewed **and updated** at regular intervals as specified within the plan **or required by law.**

*Legal Reference:*EDUCATION CODE**32280-32289 School safety plans**

35035 Powers and duties of the superintendent

35291 Rules (power of governing board)

**39831.3 Transportation safety plan****52060-52077 Local control and accountability plan****56195-56195.10 Comprehensive local plans for special education****56205-56208 Requirements for special education plan****64001 Single school plan for student achievement, consolidated application programs**CODE OF REGULATIONS, TITLE 5**560 Civil defense and disaster preparedness plans**UNITED STATES CODE, TITLE 20**6312 Local educational agency plan***Management Resources:*CSBA PUBLICATIONS~~Maximizing School Board Leadership: Vision, 1996~~WEB SITESCSBA: <http://www.csba.org>

(6/85 2/98) 10/17

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# National SD

## Board Policy

### Philosophy, Goals, Objectives, and Comprehensive Plans

E 0420.41(a)

#### CHARTER SCHOOL OVERSIGHT

##### REQUIREMENTS FOR CHARTER SCHOOLS

Charter schools shall be subject to the terms of their charters, any memorandum of understanding with their chartering authority, and other legal requirements that **are** expressly **include applicable to** charter schools, including, but not limited to, requirements that each charter school:

1. Be nonsectarian in its programs, admission policies, employment practices, and all other operations (Education Code 47605)
2. Not discriminate against any student on the basis of the characteristics listed in Education Code 220 (Education Code 47605)
3. Not charge tuition (Education Code 47605)
4. Not charge student fees for any activity that is an integral component of the educational program, except as authorized by those Education Code provisions that explicitly apply to charter schools
5. Adhere to all laws establishing the minimum age for public school attendance (Education Code 47610)
6. Serve students who are California residents and who, if over 19 years of age, are continuously enrolled in a public school and making "satisfactory progress" toward a high school diploma as defined in 5 CCR 11965 (Education Code 47612)
7. Serve students with disabilities in the same manner as such students are served in other public schools (Education Code 47646, 56145)
8. Admit all students who wish to attend the school, according to the following criteria and procedures:
  - a. Admission to the charter school shall not be determined according to the student's place of residence, or that of his/her parents/guardians, within the state, except that any existing public school converting partially or entirely to a charter school shall adopt and maintain a policy giving admission preference to students who reside within the school's former attendance area. (Education Code 47605)

E 0420.41(b)

**CHARTER SCHOOL OVERSIGHT** (continued)

- If a charter school will be physically located in a public elementary school attendance area in which 50 percent or more of the student enrollment is eligible for free or reduced-price meals, it may also establish an admissions preference for students who are currently enrolled in the public elementary school and for students who reside in the public school attendance area. (Education Code 47605.3)
- b. If the number of students who wish to attend the charter school exceeds the school's capacity, attendance, **except for existing students of the charter school,** shall be determined by a public random drawing. **However, p**Preference shall be extended to students currently attending the charter school and students who reside in the district, except as provided for in Education Code 47614.5. (Education Code 47605)
  - c. Other admissions preferences may be permitted by the chartering district on an individual school basis consistent with law. (Education Code 47605)
9. Immediately enroll a homeless student, except where such enrollment would conflict with Education Code 47605(d) (Education Code 48850; 42 USC 11431-11435)
  10. Comply with the requirements of Education Code 48850-48859 regarding the enrollment and placement of foster youth (Education Code 48853.5, 48859)
  11. If the school offers a kindergarten program: (Education Code 48000)
    - a. Offer a transitional kindergarten (TK) program to students whose fifth birthday is from September 2 through December 2
    - b. Ensure that any credentialed teacher first assigned to teach a TK class after July 1, 2015 meets the qualifications specified in Education Code 48000 by August 1, 2020
  12. Require its teachers to hold a certificate, permit, or other document issued by the Commission on Teacher Credentialing (CTC) equivalent to that which a teacher in other public schools would be required to hold (Education Code 47605)
  13. Provide annual training on child abuse and neglect reporting requirements to employees and persons working on **their the school's** behalf who are mandated reporters, within the first six weeks of each school year or within six weeks of employment (Education Code 44691)

E 0420.41(c)

**CHARTER SCHOOL OVERSIGHT** (continued)

14. Not hire any person, ~~in either a certificated or classified position,~~ who has been convicted of a violent or serious felony except as otherwise provided by law, **and, if the school contracts with an entity for specified services, verify that any employee of that entity who will have contact with students has had a criminal background check** (Education Code 44830.1, 45122.1, **45125.1**)
15. Report to the CTC any change in a certificated employee's employment status (dismissal, nonreelection, resignation, suspension, unpaid administrative leave for more than 10 days, retirement, or other decision not to employ or reemploy) as a result of an allegation of misconduct or while an allegation of misconduct is pending (Education Code 44030.5)
16. Meet the requirements of Education Code 47611 regarding the State Teachers' Retirement System (Education Code 47610)
17. Meet the requirements of Government Code 3540-3549.3 related to collective bargaining in public education employment (Education Code 47611.5)
- 18. If the school serves students in grades 7-12, adopt a policy on suicide prevention, intervention, and postvention with specified components (Education Code 215)**
- ~~18.~~ **19.** If the school serves students in grade 9, adopt a fair, objective, and transparent mathematics placement policy, with specified components (Education Code 51224.7)
- ~~19.~~ **20.** Meet all statewide standards and conduct any statewide assessments applicable to noncharter public schools (Education Code 47605, 47612.5, 60605, 60850-60859)
- ~~20.~~ **21.** Until July 31, 2018, grant a high school diploma to any student who completed grade 12 in the 2003-04 school year or a subsequent school year and who has met all applicable graduation requirements other than the passage of the high school exit examination (Education Code 60851.6)
- ~~21.~~ **22.** Offer at least the number of instructional minutes required by law for the grade levels provided by the charter school (Education Code ~~46201.2,~~ 47612.5)
- ~~22.~~ **23.** If the school provides independent study, meet the requirements of Education Code 51745-51749.3, except that the school may be allowed to offer courses required for graduation solely through independent study as an exception to Education Code 51745(e) (Education Code 47612.5, 51747.3; 5 CCR 11705)
- ~~23.~~ **24.** Identify and report to the Superintendent of Public Instruction (SPI) any portion of its average daily attendance that is generated through nonclassroom-based instruction,

E 0420.41(d)

**CHARTER SCHOOL OVERSIGHT** (continued)

including, but not limited to, independent study, home study, work study, and distance and computer-based education (Education Code 47612.5, 47634.2; 5 CCR 11963.2)

**24. 25.** If the school offers competitive athletics, annually post on the school's web site or on the web site of the charter operator the total enrollment of the school classified by gender, the number of students who participate in competitive athletics classified by gender, and the number of boys' and girls' teams classified by sport and by competition level (Education Code 221.9)

**25. 26.** If the school offers an athletic program, annually provide **an information sheets** about concussions **and** head injuries **and sudden cardiac arrest** to athletes and their parents/guardians, which must be signed and returned to the school before the athlete initiates practice or competition. In the event that an athlete is suspected of sustaining a concussion or head injury, **passes out, or faints during or immediately after participation** in an athletic activity, he/she shall be immediately removed from the activity for the remainder of the day and shall not be permitted to return to the activity until he/she is evaluated by a licensed health care provider and receives written clearance to **do so return to the activity**. (Education Code **33479-33479.5**, 49475)

**26. 27.** On a regular basis, consult with parents/guardians and teachers regarding the school's educational programs (Education Code 47605)

**27. 28.** Provide students the right to exercise freedom of speech and of the press including, but not limited to, the use of bulletin boards; the distribution of printed materials or petitions; the wearing of buttons, badges, and other insignia; and the right of expression in official publications (Education Code 48907, 48950)

**28. 29.** Maintain written contemporaneous records that document all student attendance and make these records available for audit and inspection (Education Code 47612.5)

**29. 30.** If a student subject to compulsory full-time education is expelled or leaves the charter school without graduating or completing the school year for any reason, notify the Superintendent of the school district of the student's last known address within 30 days and, upon request, provide that district with a copy of the student's cumulative record, including a transcript of grades or report card, and health information (Education Code 47605)

E 0420.41(e)

**CHARTER SCHOOL OVERSIGHT** (continued)

- 30. 31.** Electronically submit the grade point average of all students in grade 12 to the Student Aid Commission each academic year for use in the Cal Grant program, after notifying the students and their parents/guardians as applicable, by October 15 of each year, of the opportunity to opt out of being deemed a Cal Grant applicant within a specified period of time of at least 30 days (Education Code 69432.9). **If the school serves high school students, submit to the Student Aid Commission, for use in the Cal Grant program, the grade point average (GPA) of all students in grade 12 and verification of high school graduation or its equivalent for students who graduated in the prior academic year. However, such information shall not be submitted when students opt out or are permitted by the rules of the Student Aid Commission to provide test scores in lieu of the GPA. (Education Code 69432.9, 69432.92)**
- 32.** **Develop a transportation safety plan that includes procedures to ensure that a student is not left unattended on a school bus, student activity bus, youth bus, or child care motor vehicle and procedures and standards for designating an adult chaperone, other than the driver, to accompany students on a school activity bus (Education Code 39831.3)**
- 31. 33.** Comply with the California Building Standards Code as adopted and enforced by the local building enforcement agency with jurisdiction over the area in which the charter school is located, unless the charter school facility meets either of the following conditions: (Education Code 47610, 47610.5)
- a. The facility complies with the Field Act pursuant to Education Code 17280-17317 and 17365-17374.
  - b. The facility is exclusively owned or controlled by an entity that is not subject to the California Building Standards Code, including, but not limited to, the federal government.
- 32. 34.** Provide reasonable accommodations on campus to a lactating student to express breast milk, breastfeed an infant child, or address other needs related to breastfeeding (Education Code 222)
- 33. 35.** Ensure the availability and proper use of emergency epinephrine auto-injectors by: (Education Code 49414)
- a. Providing school nurses or other voluntary, trained personnel with at least one regular and one junior device for elementary schools and, for secondary schools, one regular device if there are no students who require a junior device

E 0420.41(f)

**CHARTER SCHOOL OVERSIGHT** (continued)

- b. Distributing a notice at least once per school year to all staff requesting volunteers and describing the training that volunteers will receive
- c. Providing defense and indemnification to volunteers for any and all civil liability from such administration

**36. If the school chooses to make an opioid antagonist available to persons suffering, or reasonably believed to be suffering, from an opioid overdose, comply with the requirements of Education Code 49414.3, including, but not limited to, providing training to personnel who volunteer to administer the opioid antagonist**

**34: 37.** Promptly respond to all reasonable inquiries from the district, the county office of education, or the SPI, including, but not limited to, inquiries regarding the school's financial records (Education Code 47604.3)

**35: 38.** Annually prepare and submit financial reports to the district Governing Board and the County Superintendent of Schools in accordance with the following reporting cycle:

- a. By July 1, a preliminary budget for the current fiscal year. For a charter school in its first year of operation, financial statements submitted with the charter petition pursuant to Education Code 47605(g) will satisfy this requirement. (Education Code 47604.33)
- b. By July 1 each year, an update of the school's goals and the actions to achieve those goals as identified in the charter, developed using the local control and accountability plan template **adopted by the State Board of Education in 5 CCR 15497.5**. This report shall include a review of the progress toward the goals, an assessment of the effectiveness of the specific actions toward achieving the goals, a description of changes the school will make to the specific actions as a result of the review and assessment, and a listing and description of expenditures for the fiscal year implementing the specific actions. (Education Code 47604.33, 47606.5, **52064 ; 5 CCR 15497.5**)

When conducting this review, the governing body of the school may consider qualitative information including, but not limited to, findings that result from any school quality reviews conducted pursuant to Education Code 52052 or any other reviews. To the extent practicable, data shall be reported in a manner consistent with how information is reported on a school accountability report card. The update shall be developed in consultation with teachers, principals, administrators, other school personnel, parents/guardians and students. (Education Code 47606.5)

E 0420.41(g)

**CHARTER SCHOOL OVERSIGHT** (continued)

- c. By December 15, an interim financial report for the current fiscal year reflecting changes through October 31. (Education Code 47604.33)
- d. By March 15, a second interim financial report for the current fiscal year reflecting changes through January 31. (Education Code 47604.33)
- e. By September 15, a final unaudited report for the full prior year. The report submitted to the Board shall include an annual statement of all the charter school's receipts and expenditures for the preceding fiscal year. (Education Code 42100, 47604.33)
- f. By December 15, a copy of the charter school's annual, independent financial audit report for the preceding fiscal year, unless the charter school's audit is encompassed in the district's audit. The audit report shall also be submitted to the State Controller and the California Department of Education. (Education Code 47605)

**39. Post specified information related to the prohibition against discrimination under Title IX of the Education Amendments of 1972 in a prominent and conspicuous location on the school web site or on the web site of the charter operator (Education Code 221.61)**

**36. 40.** If a direct-funded charter school, adopt and implement uniform complaint procedures to resolve complaints of unlawful discrimination or alleged violation of a state or federal law or regulation governing educational programs, in accordance with 5 CCR 4600-4670 (5 CCR 4600)

**37. 41.** Annually adopt a school accountability report card (Education Code 47612; California Constitution, Article ~~XVI-16~~, Section 8.5)

In addition, charter schools shall comply with the state and federal constitutions, applicable federal laws, and state laws that apply to governmental agencies in general, such as the Brown Act requirements in Government Code 54950-54963 and the conflict of interest laws in Government Code 1090-1099 and 87100-91014.

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# National SD

## Administrative Regulation

### Philosophy, Goals, Objectives, and Comprehensive Plans

AR 0460(a)

### LOCAL CONTROL AND ACCOUNTABILITY PLAN

#### Goals and Actions Addressing State and Local Priorities

The district's local control and accountability plan (LCAP) shall include, for the district and each district school: (Education Code 52060)

1. A description of the annual goals established for all students and for each numerically significant subgroup as defined in Education Code 52052, including ethnic subgroups, socioeconomically disadvantaged students, English learners, students with disabilities, foster youth, and homeless students. The LCAP shall identify goals for each of the following state priorities:

- a. The degree to which district teachers are appropriately assigned in accordance with Education Code 44258.9 and fully credentialed in the subject areas and for the students they are teaching; every district student has sufficient access to standards-aligned instructional materials as determined pursuant to Education Code 60119; and school facilities are maintained in good repair as specified in Education Code 17002

*(cf. 1312.4 - Williams Uniform Complaint Procedures)*

*(cf. 3517 - Facilities Inspection)*

*(cf. 4112.2 - Certification)*

*(cf. 4113 - Assignment)*

*(cf. 6161.1 - Selection and Evaluation of Instructional Materials)*

- b. Implementation of the academic content and performance standards adopted by the State Board of Education (SBE), including how the programs and services will enable English learners to access the Common Core State Standards and the English language development standards for purposes of gaining academic content knowledge and English language proficiency

*(cf. 6011 - Academic Standards)*

*(cf. 6174 - Education for English Learners)*

- c. Parent/guardian involvement, including efforts the district makes to seek parent/guardian input in district and school site decision making and how the district will promote parent/guardian participation in programs for unduplicated students, as defined in Education Code 42238.02 and Board policy, and students with disabilities



AR 0460(b)

**LOCAL CONTROL AND ACCOUNTABILITY PLAN** (continued)*(cf. 3553 - Free and Reduced Price Meals)**(cf. 6020 - Parent Involvement)**(cf. 6173.1 - Education for Foster Youth)*

- d. Student achievement, as measured by all of the following as applicable:
- (1) Statewide assessments of student achievement
  - (2) The percentage of students who have successfully completed courses that satisfy the requirements for entrance to the University of California and the California State University, or career technical education sequences or programs of study that satisfy specified requirements and align with SBE-approved career technical education standards and frameworks, including, but not limited to, those described in Education Code 52302, 52372.5, or 54692
  - (3) The percentage of English learners who make progress toward English proficiency as measured by the SBE-certified assessment of English proficiency
  - (4) The English learner reclassification rate
  - (5) The percentage of students who have passed an Advanced Placement examination with a score of 3 or higher
  - (6) The percentage of students who participate in and demonstrate college preparedness in the Early Assessment Program pursuant to Education Code 99300-99301

*(cf. 0500 - Accountability)**(cf. 6141.5 - Advanced Placement)**(cf. 6162.5 - Student Assessment)**(cf. 6162.51 - State Academic Achievement Tests)**(cf. 6178 - Career Technical Education)*

- e. Student engagement, as measured by school attendance rates, chronic absenteeism rates, middle school dropout rates, high school dropout rates, and high school graduation rates, as applicable

*(cf. 5113.1 - Chronic Absence and Truancy)**(cf. 5147 - Dropout Prevention)**(cf. 6146.1 - High School Graduation Requirements)*

AR 0460(c)

**LOCAL CONTROL AND ACCOUNTABILITY PLAN** (continued)

- f. School climate, as measured by student suspension and expulsion rates and other local measures, including surveys of students, parents/guardians, and teachers on the sense of safety and school connectedness, as applicable

*(cf. 5137 - Positive School Climate)*

*(cf. 5144 - Discipline)*

*(cf. 5144.1 - Suspension and Expulsion/Due Process)*

*(cf. 5144.2 - Suspension and Expulsion/Due Process (Students with Disabilities))*

- g. The extent to which students have access to and are enrolled in a broad course of study that includes all of the subject areas described in Education Code 51210 and 51220, as applicable, including the programs and services developed and provided to unduplicated students and students with disabilities, and the programs and services that are provided to benefit these students as a result of supplemental and concentration grant funding pursuant to Education Code 42238.02 and 42238.03

*(cf. 6143 - Courses of Study)*

*(cf. 6159 - Individualized Education Program)*

- h. Student outcomes, if available, in the subject areas described in Education Code 51210 and 51220, as applicable

2. Any goals identified for any local priorities established by the Board.

*(cf. 0200 - Goals for the School District)*

3. A description of the specific actions the district will take during each year of the LCAP to achieve the identified goals, including the enumeration of any specific actions necessary for that year to correct any deficiencies in regard to the state and local priorities specified in items #1-2 above. Such actions shall not supersede provisions of existing collective bargaining agreements within the district.

For purposes of the descriptions required by items #1-3 above, the Board may consider qualitative information, including, but not limited to, findings that result from any school quality reviews conducted pursuant to Education Code 52052 or any other reviews. (Education Code 52060)

For any local priorities addressed in the LCAP, the Board and Superintendent or designee shall identify and include in the LCAP the method for measuring the district's progress toward achieving those goals. (Education Code 52060)

To the extent practicable, data reported in the LCAP shall be reported in a manner consistent with how information is reported on a school accountability report card. (Education Code 52060)

AR 0460(d)

**LOCAL CONTROL AND ACCOUNTABILITY PLAN** (continued)*(cf. 0510 - School Accountability Report Card)***Increase or Improvement in Services for Unduplicated Students**

The LCAP shall demonstrate how the district will increase or improve services for unduplicated students at least in proportion to the increase in funds apportioned on the basis of the number and concentration of unduplicated students. (5 CCR 15494-15496)

When the district expends supplemental and/or concentration grant funds on a districtwide or schoolwide basis during the year for which the LCAP is adopted, the district's LCAP shall: (5 CCR 15496)

1. Identify those services that are being funded and provided on a districtwide or schoolwide basis
2. Describe how services are principally directed towards, and are effective in, meeting the district's goals for unduplicated students in the state priority areas and any local priority areas
3. If the enrollment of unduplicated students is less than 55 percent of district enrollment or less than 40 percent of school enrollment, describe how these services are the most effective use of the funds to meet the district's goals for its unduplicated students in the state priority areas and any local priority areas. The description shall provide the basis for this determination, including, but not limited to, any alternatives considered and any supporting research, experiences, or educational theory.

**Annual Updates**

On or before July 1 of each year, the LCAP shall be updated using the template adopted by the SBE and shall include all of the following: (Education Code 52061)

1. A review of any changes in the applicability of the goals described in the existing LCAP pursuant to the section "Goals and Actions Addressing State and Local Priorities" above
2. A review of the progress toward the goals included in the existing LCAP, an assessment of the effectiveness of the specific actions described in the existing LCAP

AR 0460(e)

**LOCAL CONTROL AND ACCOUNTABILITY PLAN** (continued)

toward achieving the goals, and a description of changes to the specific actions the district will make as a result of the review and assessment

3. A listing and description of the expenditures for the fiscal year implementing the specific actions included in the LCAP and the changes to the specific actions made as a result of the reviews and assessment required by items #1-2 above
4. A listing and description of expenditures for the fiscal year that will serve unduplicated students and students redesignated as fluent English proficient

**Availability of the Plan**

The Superintendent or designee shall post the LCAP and any updates or revisions to the LCAP on the district's web site. (Education Code 52065)

*(cf. 1113 - District and School Web Sites)*

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# National SD

## Board Policy

### Philosophy, Goals, Objectives, and Comprehensive Plans

BP 0460(a)

#### LOCAL CONTROL AND ACCOUNTABILITY PLAN

The Governing Board desires to ensure the most effective use of available funding to improve outcomes for all students. A **community-based**, comprehensive, data-driven planning process shall be used to identify annual goals and specific actions and to facilitate continuous improvement of district practices.

*(cf. 0000 - Vision)*

*(cf. 0200 - Goals for the School District)*

The Board shall adopt a districtwide local control and accountability plan (LCAP), **following based on** the template **provided in 5 CCR 15497.5 adopted by the State Board of Education**, that addresses the state priorities in Education Code 52060 and any local priorities adopted by the Board. The LCAP shall be updated on or before July 1 of each year and, like the district budget, shall cover the next fiscal year and subsequent two fiscal years. (Education Code 52060, **52064; 5 CCR 15497.5-15494-15497)**

*(cf. 3100 - Budget)*

The LCAP shall focus on improving outcomes for all students, particularly those who are "unduplicated students" **and other or are part of any numerically significant student subgroup that is at risk of or is** underperforming **students**.

*Unduplicated students* include students who are eligible for free or reduced-price meals, English learners, and foster youth, **and are counted only once as defined in Education Code 42238.01** for purposes of the local control funding formula. (Education Code 42238.02)

*(cf. 3553 - Free and Reduced Price Meals)*

*(cf. 6173.1 - Education for Foster Youth)*

*(cf. 6174 - Education for English Learners)*

**Numerically significant student subgroups include ethnic subgroups, socioeconomically disadvantaged students, English learners, students with disabilities, foster youth, and homeless students, when there are at least 30 students in the subgroup or at least 15 foster youth or homeless students, or as otherwise defined by the Superintendent of Public Instruction (SPI). (Education Code 52052)**

*(cf. 6164.4 - Identification and Evaluation of Individuals for Special Education)*

*(cf. 6173 - Education for Homeless Children)*

BP 0460(b)

**LOCAL CONTROL AND ACCOUNTABILITY PLAN** (continued)

The Superintendent or designee shall review the single plan for student achievement (SPSA) submitted by each district school pursuant to Education Code 64001 to ensure that the specific actions included in the LCAP are consistent with strategies included in the SPSA. (Education Code 52062)

*(cf. 0420 - School Plans/Site Councils)*

The LCAP shall also be aligned with other district and school plans to the extent possible in order to minimize duplication of effort and provide clear direction for program implementation.

*(cf. 0400 - Comprehensive Plans)*  
*(cf. 0440 - District Technology Plan)*  
*(cf. 0450 - Comprehensive Safety Plan)*  
*(cf. 5030 - Student Wellness)*  
*(cf. 6171 - Title I Programs)*  
*(cf. 7110 - Facilities Master Plan)*

Any complaint that the district has not complied with legal requirements pertaining to the LCAP may be filed pursuant to AR 1312.3 - Uniform Complaint Procedures. (Education Code 52075)

*(cf. 1312.3 - Uniform Complaint Procedures)*

**Plan Development**

The Superintendent or designee shall gather data and information needed for effective and meaningful plan development and present it to the Board and community. Such data and information shall include, but not be limited to, data regarding the number of students in student subgroups, disaggregated data on student achievement levels, and information about current programs and expenditures.

The Board shall consult with teachers, principals, administrators, other school personnel, employee bargaining units, parents/guardians, and students in developing the LCAP. Consultation with students shall enable unduplicated students and other numerically significant student subgroups to review and comment on LCAP development and may include surveys of students, student forums, student advisory committees, and/or meetings with student government bodies or other groups representing students. (Education Code 52060; 5 CCR 15495)

*(cf. 1220 - Citizen Advisory Committees)*  
*(cf. 4140/4240/4340 - Bargaining Units)*  
*(cf. 6020 - Parent Involvement)*

BP 0460(c)

**LOCAL CONTROL AND ACCOUNTABILITY PLAN** (continued)**Public Review and Input**

The Board shall establish a parent advisory committee to review and comment on the LCAP. The committee shall be composed of a majority of parents/guardians and shall include at least one parent/guardian of an unduplicated student as defined above. (Education Code 52063; 5 CCR 15495)

Whenever district enrollment includes at least 15 percent English learners, with at least 50 students who are English learners, the Board shall establish an English learner parent advisory committee composed of a majority of parents/guardians of English learners. (Education Code 52063; 5 CCR 15495)

The Superintendent or designee shall present the LCAP to the committee(s) before it is submitted to the Board for adoption, and shall respond in writing to comments received from the committee(s). (Education Code 52062)

The Superintendent or designee shall notify members of the public of the opportunity to submit written comments regarding the specific actions and expenditures proposed to be included in the LCAP. The notification shall be provided using the most efficient method of notification possible, which may not necessarily include producing printed notices or sending notices by mail. All written notifications related to the LCAP shall be provided in the primary language of parents/guardians when required by Education Code 48985. (Education Code 52062)

*(cf. 5145.6 - Parental Notifications)*

As part of the parent and community engagement process, the district shall solicit input on effective and appropriate instructional methods, including, but not limited to, establishing language acquisition programs to enable all students, including English learners and native English speakers, to have access to the core academic content standards and to become proficient in English. (Education Code 305-306)

The Board shall hold at least one public hearing to solicit the recommendations and comments of members of the public regarding the specific actions and expenditures proposed to be included in the LCAP. The public hearing shall be held at the same meeting as the budget hearing required pursuant to Education Code 42127 and AR 3100 - Budget. (Education Code 42127, 52062)

*(cf. 9320 - Meetings and Notices)*

**Adoption of the Plan**

The Board shall adopt the LCAP prior to adopting the district budget, but at the same public meeting. This meeting shall be held after the public hearing described above, but not on the same day as the hearing.

BP 0460(d)

**LOCAL CONTROL AND ACCOUNTABILITY PLAN** (continued)

The Board may adopt revisions to the LCAP at any time during the period in which the plan is in effect, provided the Board follows the process to adopt the LCAP pursuant to Education Code 52062 and the revisions are adopted in a public meeting. (Education Code 52062)

**Submission of Plan to County Superintendent of Schools**

Not later than five days after adoption of the LCAP, the Board shall file the LCAP with the County Superintendent of Schools. (Education Code 52070)

If the County Superintendent sends, by August 15, a written request for clarification of the contents of the LCAP, the Board shall respond in writing within 15 days of the request. If the County Superintendent then submits recommendations for amendments to the LCAP within 15 days of receiving the Board's response, the Board shall consider those recommendations in a public meeting within 15 days of receiving the recommendations. (Education Code 52070)

**Monitoring Progress**

The Superintendent or designee shall report to the Board, at least annually in accordance with the timeline and indicators established by him/her and the Board, regarding the district's progress toward attaining each goal identified in the LCAP. Evaluation shall include, but not be limited to, an assessment of district and school performance ~~based on evaluation rubrics adopted by the State Board of Education pursuant to Education Code 52064.5~~ **reported on the California School Dashboard**. Evaluation data shall be used to recommend any necessary revisions to the LCAP.

*(cf. 0500 - Accountability)*

**Differentiated Assistance/Intervention**

When it is in the best interest of the district, the Board may submit a request to the County Superintendent for differentiated assistance, including, but not limited to: (Education Code 52071)

1. Assistance in the identification of district strengths and weaknesses in regard to state priorities, and review of effective, evidence-based programs that apply to the district's goals
2. Assistance from an academic expert, team of academic experts, or another district in the county in identifying and implementing effective programs to improve the outcomes for student subgroups
3. Advice and assistance from the California Collaborative for Educational Excellence established pursuant to Education Code 52074



BP 0460(e)

**LOCAL CONTROL AND ACCOUNTABILITY PLAN (continued)**

In the event that the County Superintendent requires the district to receive differentiated assistance pursuant to Education Code 52071, the Board shall review all recommendations received from the County Superintendent or other advisor and shall consider revisions to the LCAP as appropriate in accordance with the process specified in Education Code 52062.

If the **Superintendent of Public Instruction (SPI)** identifies the district as needing intervention pursuant to Education Code 52072, the district shall cooperate with any action taken by the SPI or any academic advisor appointed by the SPI, which may include one or more of the following:

1. Revision of the district's LCAP
2. Revision of the district's budget in accordance with changes in the LCAP
3. A determination to stay or rescind any district action that would prevent the district from improving outcomes for all student subgroups, provided that action is not required by a collective bargaining agreement

*Legal Reference:*EDUCATION CODE

305-306 English language education

17002 State School Building Lease-Purchase Law, including definition of good repair

33430-33436 Learning Communities for School Success Program; grants for LCAP implementation

41020 Audits

42127 Public hearing on budget adoption

42238.01-42238.07 Local control funding formula

44258.9 County superintendent review of teacher assignment

48985 Parental notices in languages other than English

51210 Course of study for grades 1-6

51220 Course of study for grades 7-12

52052 **Academic Performance Index; n**Numerically significant student subgroups

52060-52077 Local control and accountability plan

52302 Regional occupational centers and programs

52372.5 Linked learning pilot program

54692 Partnership academies

60119 Sufficiency of textbooks and instructional materials; hearing and resolution

60605.8 California Assessment of Academic Achievement; Academic Content Standards Commission

60811.3 Assessment of language development

64001 Single plan for student achievement

99300-99301 Early Assessment Program

CODE OF REGULATIONS, TITLE 515494-~~15497.5~~ **15497** Local control and accountability plan and spending requirementsUNITED STATES CODE, TITLE 20

6312 Local educational agency plan

6826 Title III funds, local plans

BP 0460(f)

**LOCAL CONTROL AND ACCOUNTABILITY PLAN (continued)***Management Resources:*CSBA PUBLICATIONS*Promising Practices for Developing and Implementing LCAPs, Governance Brief, November 2016**LCFF Rubrics, Issue 1: What Boards Need to Know About the New Rubrics, Governance Brief, rev. October 2016*CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS*California School Accounting Manual*California School Dashboard*LCFF Frequently Asked Questions*Local Control and Accountability Plan and Annual Update (LCAP) Template*Every Student Succeeds Act – Update #6, January 18, 2017*Family Engagement Framework: A Tool for California School Districts, 2014California Career Technical Education Model Curriculum Standards, 2013CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS (continued)California Common Core State Standards: English Language Arts and Literacy in History/Social Studies, Science, and Technical Subjects, rev. 2013California Common Core State Standards: Mathematics, rev. 2013California English Language Development Standards, 2012WEB SITES*CSBA: <http://www.csba.org>**California Department of Education: <http://www.cde.ca.gov>**California School Dashboard: <http://www.caschooldashboard.org>*

# National SD Board Policy

## Philosophy, Goals, Objectives, and Comprehensive Plans

BP 0500(a)

### ACCOUNTABILITY

The Governing Board recognizes its responsibility to ensure accountability to the public for the performance of the district and each district school. The Board shall regularly review the effectiveness of district programs, personnel, and fiscal operations, with a focus on the capacity to improve student achievement. The district shall establish appropriate processes and measures to monitor results and to evaluate progress toward accomplishing the district's vision and goals set forth in the local control and accountability plan (LCAP).

*(cf. 0000 - Vision)*  
*(cf. 0200 - Goals for the School District)*  
*(cf. 0460 - Local Control and Accountability Plan)*  
*(cf. 2140 - Evaluation of the Superintendent)*  
*(cf. 3460 - Financial Reports and Accountability)*  
*(cf. 4115 - Evaluation/Supervision)*  
*(cf. 4215 - Evaluation/Supervision)*  
*(cf. 4315 - Evaluation/Supervision)*  
*(cf. 6011 - Academic Standards)*  
*(cf. 6141 - Curriculum Development and Evaluation)*  
*(cf. 6190 - Evaluation of the Instructional Program)*  
*(cf. 9400 - Board Self-Evaluation)*

District and school performance shall be annually evaluated based on multiple measures specified in the California Accountability and Continuous Improvement System as reported on the California School Dashboard.

*(cf. 6162.5 - Student Assessment)*  
*(cf. 6162.51 - State Academic Achievement Tests)*

The district and each district school shall demonstrate comparable improvement in academic achievement for all numerically significant student subgroups. Numerically significant subgroups include ethnic subgroups, socioeconomically disadvantaged students, English learners, students with disabilities, foster youth, and homeless students, when the subgroup consists of at least 30 students with a valid test score or 15 foster youth or homeless students. (Education Code 52052)

The Superintendent or designee shall provide regular reports to the Board and the public regarding district and school performance. Opportunities for feedback from students, parents/guardians, staff, and community members shall be made available as part of any review and evaluation of district programs and operations and as part of the development or annual update of the LCAP.

(cf. 0510 - School Accountability Report Card)  
 (cf. 1100 - Communication with the Public)  
 (cf. 1113 - District and School Web Sites)  
 (cf. 1112 - Media Relations)  
 (cf. 1220 - Citizen Advisory Committees)  
 (cf. 6020 - Parent Involvement)

Evaluation results may be used as a basis for revising district or school goals, updating the LCAP or other comprehensive plans, identifying and developing strategies to address disparities in achievement among student subgroups, implementing programmatic changes, determining the need for additional support and assistance, awarding incentives or rewards, and establishing other performance-based consequences.

(cf. 0400 - Comprehensive Plans)  
 (cf. 0420 - School Plans/Site Councils)  
 (cf. 4141/4241 - Collective Bargaining Agreement)

*Legal Reference:*

EDUCATION CODE

33127-33129 Standards and criteria for fiscal accountability  
 33400-33407 California Department of Education evaluation of district programs  
 44660-44665 Evaluation of certificated employees  
 51041 Evaluation of the educational program  
 52052-52052.1 Public school performance accountability program  
 52060-52077 Local control and accountability plan  
 56366 Nonpublic, nonsectarian schools  
 60640-60649 California Assessment of Student Performance and Progress  
CODE OF REGULATIONS, TITLE 5  
 1068-1074 Alternative schools accountability model, assessments  
 15440 15464 Standards and criteria for fiscal accountability  
UNITED STATES CODE, TITLE 20  
 6311 Accountability,  
 6312 Local educational agency plan

CODE OF FEDERAL REGULATIONS, TITLE 34

~~200.13-200.20~~ 200.12-200.24 State accountability system  
 200.30-~~200.53~~ 200.48 State and LEA report cards and plans

*Management Resources:*

WEB SITES

CSBA: <http://www.csba.org>  
 California Department of Education, Accountability: <http://www.cde.ca.gov/ta/ac>  
 California School Dashboard: <http://www.caschooldashboard.org>  
 U.S. Department of Education: <http://www.ed.gov>

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# National SD

## Administrative Regulation

### District And School Web Sites

AR 1113(a)

#### Community Relations

##### Design Standards

The Superintendent or designee shall develop design standards for district and school web sites that include, but are not limited to, guidelines to ensure the clear organization of the material, readability of the font type and size, and simplicity of the navigation structure linking the content on the web site. Such standards shall take into consideration the ease of use on a wide range of devices.

In accordance with the requirements of the Americans with Disabilities Act and Section 504 of the federal Rehabilitation Act of 1973, district and school web sites shall contain features that ensure accessibility for individuals with disabilities, which may include, but are not limited to, captions for videos and multimedia presentations, text alternatives to images, provision of sufficient time to use the content, avoidance of flashing images, adequate contrast in visual presentations, and/or other features that meet applicable standards for web site accessibility. The Superintendent or designee shall regularly review district and school web sites and modify them as needed to ensure legal compliance with accessibility standards.

*(cf. 0410 - Nondiscrimination in District Programs and Activities)*

##### Guidelines for Web Site Content

As applicable, district and school web sites shall provide current information regarding district/school programs, activities, and operations. Such information shall be appropriate for both internal and external audiences and may include the district's mission and goals, district/school programs and operations, district/school news, agendas and minutes of Governing Board meetings, School Accountability Report Cards, school calendars, and links to educational resources.

*(cf. 0440 - District Technology Plan)*

*(cf. 0510 - School Accountability Report Card)*

*(cf. 1100 - Communication with the Public)*

*(cf. 1112 - Media Relations)*

*(cf. 6020 - Parent Involvement)*

*(cf. 9322 - Agenda/Meeting Materials)*

With approval of the principal, individual teachers may create web pages linked to the district or school web site to provide information pertaining to class assignments, expectations, and activities.

AR 1113(b)

**DISTRICT AND SCHOOL WEB SITES** (continued)

Student work may be published on district or school web sites provided that both the student and his/her parent/guardian provide written permission or the work is part of an existing publication such as a school newspaper.

~~The Superintendent or designee shall ensure that copyright laws are not violated in the use of materials on district and school web sites. If any copyrighted material is posted a notice shall be included crediting the original producer of the material and noting how and when permission to reprint the material was granted.~~ **Any copyrighted material to be posted on a district or school web site shall be submitted to the Superintendent or designee together with the permission of the copyright owner to reprint the material. Any copyrighted material submitted without the copyright owner's permission shall only be posted on a district or school web site if the Superintendent or designee determines that the material is in the public domain or that the intended use meets the criteria for fair use or another exception pursuant to 17 USC 107-122. When any copyrighted material is posted, the web site shall include a notice crediting the copyright owner and, as necessary, shall note that permission to reprint the material was granted.**

*(cf. 4132/4232/4332 - Publication or Creation of Materials)*

*(cf. 6162.6 - Use of Copyrighted Materials)*

Whenever a district or school web site includes links to external web sites, it shall include a disclaimer that the district is not responsible for the content of external web sites.

**Roles and Responsibilities**

Any employee assigned as a district or school webmaster shall be responsible for the uploading of material to the web site(s) upon approval of the Superintendent or designee. He/she shall **review district and school web sites to** ensure consistency ~~of the material~~ with district standards, regularly check links for accuracy and appropriateness, keep the web server free of outdated or unused files, and provide technical assistance as needed.

The Superintendent or designee may assign additional staff members to conduct ~~an~~ editorial reviews of all materials submitted for publication on district or school web sites and to make corrections as needed in spelling, grammar, or accuracy of content.

The Superintendent or designee shall provide staff development opportunities related to district content guidelines, design standards, and accessibility laws and standards to district communications and technology staff, district and school webmasters, and/or other appropriate staff.

AR 1113(c)

**DISTRICT AND SCHOOL WEB SITES** (continued)

*(cf. 4131 - Staff Development)*

*(cf. 4231 - Staff Development)*

*(cf. 4331 - Staff Development)*

**Security**

The Superintendent or designee shall establish security procedures for the district's computer network to prevent unauthorized access and changes to district and school web sites. To the extent possible, the host computer(s) shall be in a lockable room with restricted access.

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# National SD

## Board Policy

### District And School Web Sites

BP 1113(a)

#### Community Relations

To enhance communication with students, parents/guardians, staff, and community members, the Governing Board encourages the Superintendent or designee to develop and maintain district and school web sites. The use of district and school web sites shall support the district's vision and goals and shall be coordinated with other district communications strategies.

*(cf. 0000 - Vision)*  
*(cf. 0440 - District Technology Plan)*  
*(cf. 1100 - Communication with the Public)*  
*(cf. 1112 - Media Relations)*  
*(cf. 1114 - District-Sponsored Social Media)*  
*(cf. 6020 - Parent Involvement)*

#### Design Standards

The Superintendent or designee shall establish design standards for district and school web sites in order to maintain a consistent identity, professional appearance, and ease of use.

The USDOT's A U.S. Department of Justice technical assistance publication, **Accessibility of State and Local Government Websites to People with Disabilities**, states that an agency with ~~an inaccessible web site~~ **a web site that is otherwise inaccessible to individuals with disabilities** may also meet its legal obligations by providing an alternative accessible way for ~~individuals with disabilities~~ **them** to use the programs or services (e.g., a staffed telephone information line), but points out that these alternatives are unlikely to provide an equal degree of access in terms of hours of operation or range of options and programs available. **See the accompanying administrative regulation for accessibility guidelines.**

The district's design standards shall address the accessibility of district ~~sponsored~~ **and school** web sites to individuals with disabilities, including compatibility with commonly used assistive technologies.

*(cf. 0410 - Nondiscrimination in District Programs and Activities)*

#### **Guidelines for Web Site Content**

The Superintendent or designee shall develop content guidelines for district and school web sites and ~~shall~~ assign staff to review and approve content prior to posting.

Board policy pertaining to advertising in district and school publications, as specified in BP 1325 - Advertising and Promotion, shall also apply to advertising on district and school web sites.



BP 1113(b)

**DISTRICT AND SCHOOL WEB SITES** (continued)*(cf. 1325 - Advertising and Promotion)***Privacy Rights**

The Superintendent or designee shall ensure that the privacy rights of students, parents/guardians, staff, Board members, and other individuals are protected on district and school web sites.

*(cf. 1340 - Access to District Records)**(cf. 4119.23/4219.23/4319.23 - Unauthorized Release of Confidential/Privileged Information)**(cf. 5022 - Student and Family Privacy Rights)**(cf. 5125 - Student Records)*

Telephone numbers and home and email addresses of students and/or their parents/guardians shall not be published on district or school web sites.

*(cf. 5125.1 - Release of Directory Information)*

~~Because of the wide accessibility of the Internet and potential risk to students, p~~Photographs of individual students shall not be published **on district or school web sites** ~~with their names accompanied by the student's name~~ or other personally identifiable information without the prior written consent of the student's parent/guardian.

**If students' names are not included, p**Photographs of **individual students or** groups of students, such as at a school event, may be published **on school or district web sites** ~~provided that students' names are not included.~~

~~Staff members'~~ **Employees'** home addresses, ~~or~~ **personal** telephone numbers, **and personal email addresses** shall not be posted on district or school web sites.

The home address or telephone number of any elected or appointed official including, but not limited to, a Board member or public safety official, shall not be posted on district or school web sites without the prior written permission of that individual. (Government Code 3307.5, 6254.21, 6254.24)

No public safety official shall be required to consent to the posting on the Internet of his/her photograph or identity as a public safety officer for any purpose if that officer reasonably believes that the disclosure may result in a threat, harassment, intimidation, or harm to the officer or his/her family. (Government Code 3307.5)

*(cf. 3515.3 - District Police/Security Department)*

BP 1113(c)

**DISTRICT AND SCHOOL WEB SITES (continued)***Legal Reference:*EDUCATION CODE

35182.5 *Contracts for advertising*  
 35258 *Internet access to school accountability report cards*  
 48907 *Exercise of free expression; rules and regulations*  
 48950 *Speech and other communication*  
 49061 *Definitions, directory information*  
 49073 *Release of directory information*  
 60048 *Commercial brand names, contracts or logos*

BUSINESS AND PROFESSIONS CODE

**22580-22582 Digital privacy**  
**22584-22585 Student Online Personal Information Protection Act**  
**22586 Preschool and prekindergarten privacy**

GOVERNMENT CODE

3307.5 *Publishing identity of public safety officers*  
 6254.21 *Publishing addresses and telephone numbers of officials*  
 6254.24 *Definition of public safety official*  
 11135 *Nondiscrimination; accessibility to state web sites*

PENAL CODE

14029.5 *Prohibition against publishing personal information of person in witness protection program*

UNITED STATES CODE, TITLE 17

~~101-1101 Federal copyright law~~  
**101-122 Subject matter and scope of copyright**  
**504 Penalties for copyright infringement**

UNITED STATES CODE, TITLE 20

1232g *Federal Family Educational Rights and Privacy Act*

UNITED STATES CODE, TITLE 29

**705 Definitions; Vocational Rehabilitation Act**  
 794 *Section 503 of the Rehabilitation Act of 1973; accessibility to federal web sites*

UNITED STATES CODE, TITLE 42

12101-12213 *Americans with Disabilities Act*

CODE OF FEDERAL REGULATIONS, TITLE 16

312.1-312.12 *Children's Online Privacy*

CODE OF FEDERAL REGULATIONS, TITLE 34

99.1-99.67 *Family Educational Rights and Privacy*

**104.1-104.61 Nondiscrimination on the basis of disability**

COURT DECISIONS

**City of San Jose v. Superior Court, (2017) 2 Cal.5th 608**

*Aaris v. Las Virgenes Unified School District, (1998) 64 Cal.App.4th 1112*

*Management Resources:***U.S. DEPARTMENT OF EDUCATION OFFICE FOR CIVIL RIGHTS PUBLICATIONS**

**Dear Colleague Letter, May 26, 2011**

**Joint Dear Colleague Letter: Electronic Book Readers, June 2010**

U.S. DEPARTMENT OF JUSTICE PUBLICATIONS

*Accessibility of State and Local Government Websites to People with Disabilities, June 2003*

WORLD WIDE WEB CONSORTIUM PUBLICATIONS

*Web Content Accessibility Guidelines, December 2008*

WEB SITES

CSBA: <http://www.csba.org>

BP 1113(d)

**DISTRICT AND SCHOOL WEB SITES** (continued)

*California Department of Education, Web Accessibility Standards:*

*<http://www.cde.ca.gov/re/di/ws/webaccessstds.asp>*

*California School Public Relations Association: <http://www.calspra.org>*

***U.S. Department of Education, Office for Civil Rights: <https://www2.ed.gov/about/offices/list/ocr>***

*U.S. Department of Justice, Americans with Disabilities Act: <http://www.ada.gov>*

*World Wide Web Consortium, Web Accessibility Initiative: <http://www.w3.org/wai>*

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# National SD

## Board Policy

Administration

BP 2140(a)

### EVALUATION OF THE SUPERINTENDENT

The Governing Board recognizes that, in order to effectively fulfill its responsibilities for setting direction, ensuring accountability, and providing community leadership for the district, it must adopt measures for holding the Superintendent accountable. At a minimum, the Board shall annually conduct a formal evaluation of the Superintendent's performance to assess his/her effectiveness in leading the district toward established goals. In addition, the evaluation process may include opportunities during the year for review of the Superintendent's progress toward meeting the goals. The evaluation shall be in accordance with the provisions of the Superintendent's contract and any applicable Board policy.

**The Governing Board recognizes its responsibility to establish an evaluation system that enables a fair assessment of the Superintendent's effectiveness in leading the district toward established goals, serves to support his/her continued growth in leadership and management skills, and provides a basis for Board decisions regarding contract extension and compensation. The Board shall annually conduct a formal evaluation of the Superintendent's performance and may provide additional opportunities throughout the year to review the Superintendent's progress toward meeting established goals.**

*(cf. 0000 - Vision)*

*(cf. 0200 - Goals for the School District)*

*(cf. 0500 - Accountability)*

*(cf. 2121 - Superintendent's Contract)*

*(cf. 9000 - Role of the Board)*

*(cf. 9005 - Governance Standards)*

**The Board shall determine, with the Superintendent's input, the criteria, schedule, method(s), and instrument(s) to be used for the Superintendent's evaluation.** Evaluation criteria shall be agreed upon by the Board and Superintendent prior to the evaluation and shall include, but **are** not **be** limited to, district goals and success indicators; educational, management, and community leadership skills; and the Superintendent's professional relationship with the Board.

*(cf. 2110 - Superintendent Responsibilities and Duties)*

*(cf. 2111 - Superintendent Governance Standards)*

**The Board and Superintendent shall jointly determine the evaluation method(s) and schedule that will best serve the district and the structure and format of the instrument to be used.**

Prior to the evaluation, the Superintendent shall provide to the Board for its review a report of progress toward district goals, the Superintendent's self-appraisal of accomplishments and performance, and a statement of actions taken to address any Board recommendations from the previous evaluation.

BP 2140(b)

**EVALUATION OF THE SUPERINTENDENT** (continued)

Each Board member shall independently evaluate the Superintendent's performance **based upon the evaluation criteria**, ~~Based on these individual evaluations, after which~~ the Board president shall produce a **single** document that **summarizes integrates** the individual evaluations **and represents the consensus of the Board**. ~~The Board shall then take action on this document and present it to the Superintendent for his/her response.~~

*(cf. 9121 - President)*

The evaluation shall provide commendations in areas of strength and achievement, **and provide recommendations for improving effectiveness in any areas of need, concern, and or unsatisfactory performance, and serve as a basis for making decisions about salary increase and/or contract extension.**

The Board shall meet in closed session with the Superintendent to discuss the evaluation. (Government Code 54957)

*(cf. 9321 - Closed Session Purposes and Agendas)*  
*(cf. 9321.1 - Closed Session Actions and Reports)*

**At this meeting, T**he Superintendent shall have an opportunity to ask questions, respond verbally and in writing to the evaluation, and present additional **evidence of information regarding** his/her performance or district progress.

**The discussion shall include the establishment of performance goals for the next year and may identify professional development opportunities for the Superintendent and/or the entire governance team to address areas of concern, strengthen the relationship between the Superintendent and Board, or enhance the Superintendent's knowledge of current educational issues and leadership and management skills.**

*(cf. 9240 - Board Training)*  
*(cf. 9400 - Board Self-Evaluation)*

After the Board and Superintendent have discussed the evaluation, the Board president and Superintendent shall sign the evaluation and it shall be placed in the Superintendent's personnel file. **The evaluation, including personal performance goals, shall be confidential to the extent permitted by law.**

*(cf. 4112.6/4212.6/4312.6 - Personnel Files)*

~~At the open session after the Superintendent's evaluation or at a subsequent meeting, the Board and Superintendent shall jointly identify performance goals for the next year.~~

~~*(cf. 9400 - Board Self Evaluation)*~~

BP 2140(c)

**EVALUATION OF THE SUPERINTENDENT (continued)**

*Legal Reference:*

GOVERNMENT CODE

**6254.8 Public Records Act; employment contracts**

~~53262 Employment contracts, superintendent~~

54957 Closed session, personnel matters

COURT DECISIONS

**Versaci v. Superior Court, (2005) 127 Cal.App.4th 805**

Duval v. Board of Trustees, (2001) 93 Cal.App.4th 902

*Management Resources:*

CSBA PUBLICATIONS

~~Maximizing School Board Governance: Superintendent Evaluation, 2006~~

WEB SITES

CSBA: <http://www.csba.org>

Association of California School Administrators: <http://www.acsa.org>

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# CSBA Sample Board Policy

## Business and Noninstructional Operations

BP 3100(a)

### BUDGET

The Governing Board recognizes its critical responsibility for adopting a sound budget for each fiscal year which is aligned with the district's vision, goals, priorities, local control and accountability plan (LCAP), and other comprehensive plans. The district budget shall guide decisions and actions throughout the year and shall serve as a tool for monitoring the fiscal health of the district.

*(cf. 0000 - Vision)*

*(cf. 0200 - Goals for the School District)*

*(cf. 0400 - Comprehensive Plans)*

*(cf. 0460 - Local Control and Accountability Plan)*

*(cf. 3300 - Expenditures and Purchases)*

*(cf. 3460 - Financial Reports and Accountability)*

*(cf. 9000 - Role of the Board)*

The district budget shall show a complete plan and itemized statement of all proposed expenditures and all estimated revenues for the following fiscal year, together with a comparison of revenues and expenditures for the current fiscal year. The budget shall also include the appropriations limit and the total annual appropriations subject to limitation as determined pursuant to Government Code 7900-7914. (Education Code 42122)

### Budget Development and Adoption Process

In order to provide guidance in the development of the budget, the Board shall annually establish budget priorities based on identified district needs and goals and on realistic projections of available funds.

The Superintendent or designee shall oversee the preparation of a proposed district budget for approval by the Board and shall involve appropriate staff in the development of budget projections.

The Board shall hold a public hearing on the proposed budget in accordance with Education Code 42103 and 42127.

*(cf. 9320 - Meetings and Notices)*

*(cf. 9322 - Agenda/Meeting Materials)*

*(cf. 9323 - Meeting Conduct)*

The Board shall adopt the district budget on or before July 1 of each year. (Education Code 42127)

At a public meeting held on a date after the public hearing on the budget, the Board shall adopt the budget following its adoption of the LCAP or an annual update to the LCAP at the same meeting. The budget shall include the expenditures necessary to implement the LCAP or the annual update to the LCAP. (Education Code 42127)

The budget that is formally adopted by the Board shall adhere to the state's Standardized Account Code Structure as prescribed by the Superintendent of Public Instruction. (Education Code 42126, 42127)

BP 3100(b)

**BUDGET** (continued)

The Superintendent or designee may supplement this format with additional information as necessary to effectively communicate the budget to the Board, staff, and public.

No later than five days after the Board adopts the district budget or by July 1, whichever occurs first, the Board shall file with the County Superintendent of Schools the adopted district budget and supporting data. The budget and supporting data shall be maintained and made available for public review. (Education Code 42127)

*(cf. 1340 - Access to District Records)*

If the County Superintendent disapproves or conditionally approves the district's budget, the Board shall review and respond to his/her recommendations at a public meeting on or before ~~September~~ **October 8**. The response shall include any revisions to the adopted budget and any other proposed actions to be taken as a result of those recommendations. (Education Code 42127)

**Budget Advisory Committee**

**OPTION 1:** The Superintendent or designee may appoint a budget advisory committee composed of staff, Board representatives, and/or members of the community.

The committee shall submit recommendations during the budget development process and its duties shall be assigned each year based on district needs. All recommendations of the committee shall be advisory only and shall not be binding on the Board.

*(cf. 1220 - Citizen Advisory Committees)*

*(cf. 2230 - Representative and Deliberative Groups)*

*(cf. 3350 - Travel Expenses)*

*(cf. 9130 - Board Committees)*

*(cf. 9140 - Board Representatives)*

**Budget Criteria and Standards**

The Superintendent or designee shall develop a district budget in accordance with state criteria and standards specified in 5 CCR 15440-15450 as they relate to projections of average daily attendance (ADA), enrollment, ratio of ADA to enrollment, local control funding formula revenue, salaries and benefits, other revenues and expenditures, facilities maintenance, deficit spending, unrestricted general fund balance, and reserves. In addition, he/she shall provide the supplemental information specified in 5 CCR 15451 which addresses the methodology and budget assumptions used, contingent liabilities, use of one-time revenues for ongoing expenditures, use of ongoing revenues for one-time expenditures, contingent revenues, contributions, long-term commitments, unfunded liabilities, status of collective bargaining agreements, the LCAP, and LCAP expenditures. (Education Code 33128, 33128.3, 33129, 42127.01; 5 CCR 15440-15451)

The district budget shall provide for increasing or improving services for unduplicated students at least in proportion to the increase in funds apportioned on the basis of the number



BP 3100(c)

**BUDGET** (continued)

and concentration of unduplicated students. *Unduplicated students* are students who are eligible for free or reduced-price meals, English learners, and/or foster youth. (Education Code 42238.07; 5 CCR 15496)

(cf. 3553 - *Free and Reduced Price Meals*)

(cf. 6173.1 - *Education for Foster Youth*)

(cf. 6174 - *Education for English Language Learners*)

The Board may establish other budget assumptions or parameters which may take into consideration the stability of funding sources, legal requirements and constraints on the use of funds, anticipated increases and/or decreases in the cost of services and supplies, program requirements, and any other factors necessary to ensure that the budget is a realistic plan for district revenues and expenditures.

(cf. 2210 - *Administrative Discretion Regarding Board Policy*)

(cf. 3110 - *Transfer of Funds*)

**Fund Balance**

The district shall classify fund balances in compliance with Governmental Accounting Standards Board (GASB) Statement 54, as follows:

1. *Nonspendable fund balance* includes amounts that are not expected to be converted to cash, such as resources that are not in a spendable form (e.g., inventories and prepaids) or that are legally or contractually required to be maintained intact.
2. *Restricted fund balance* includes amounts constrained to specific purposes by their providers or by law.
3. *Committed fund balance* includes amounts constrained to specific purposes by the Board.

For this purpose, all commitments of funds shall be approved by a majority vote of the Board. The constraints shall be imposed no later than the end of the reporting period (June 30), although the actual amounts may be determined subsequent to that date but prior to the issuance of the financial statements.

4. *Assigned fund balance* includes amounts which are intended for a specific purpose but do not meet the criteria to be classified as restricted or committed.

The Board delegates authority to assign funds to the assigned fund balance to the Superintendent and authorizes the assignment of such funds to be made any time prior to the issuance of the financial statements. The Superintendent may further delegate the authority to assign funds at his/her discretion.

5. *Unassigned fund balance* includes amounts that are available for any purpose.

When multiple types of funds are available for an expenditure, the district shall first utilize funds from the restricted fund balance as appropriate, then from the committed fund balance, then from the assigned fund balance, and lastly from the unassigned fund balance.

BP 3100(d)

**BUDGET** (continued)

The Board intends to maintain a minimum assigned and unassigned fund balance in an amount the Board deems sufficient to maintain fiscal solvency and stability and to protect the district against unforeseen circumstances.

If the assigned and unassigned fund balance falls below the level set by the Board due to an emergency situation, unexpected expenditures, or revenue shortfalls, the Board shall develop a plan to recover the fund balance which may include dedicating new unrestricted revenues, reducing expenditures, and/or increasing revenues or pursuing other funding sources.

**Long-Term Financial Obligations**

The district's current-year budget and multiyear projections shall include adequate provisions for addressing the district's long-term financial obligations, including, but not limited to, long-term obligations resulting from collective bargaining agreements, financing of facilities projects, unfunded or future liability for retiree benefits, and accrued workers' compensation claims.

*(cf. 4141/4241 - Collective Bargaining Agreement)*  
*(cf. 4154/4254/4354 - Health and Welfare Benefits)*  
*(cf. 7210 - Facilities Financing)*  
*(cf. 9250 - Remuneration, Reimbursement and Other Benefits)*

**Budget Amendments**

No later than 45 days after the Governor signs the annual Budget Act, the Superintendent or designee shall make available for public review any revisions in budgeted revenues and expenditures which occur as a result of the funding made available by that Budget Act. (Education Code 42127)

Whenever revenues and expenditures change significantly throughout the year, the Superintendent or designee shall recommend budget amendments to ensure accurate projections of the district's net ending balance. When final figures for the prior-year budget are available, this information shall be used as soon as possible to update the current-year budget's beginning balance and projected revenues and expenditures.

In addition, budget amendments shall be submitted for Board approval as necessary when collective bargaining agreements are accepted, district income declines, increased revenues or unanticipated savings are made available to the district, program proposals are significantly different from those approved during budget adoption, interfund transfers are needed to meet actual program expenditures, and/or other significant changes occur that impact budget projections.

*Legal Reference: (see next page)*

BP 3100(e)

**BUDGET (continued)***Legal Reference:*EDUCATION CODE

1240 Duties of county superintendent of schools  
 33127-33131 Standards and criteria for local budgets and expenditures  
 42103 Public hearing on proposed budget; requirements for content of proposed budget  
 42122-42129 Budget requirements  
 42130-42134 Financial certifications  
 42140-42141 Disclosure of fiscal obligations  
 42238-42251 Apportionments to districts, especially:  
 42238.01-42238.07 Local control funding formula  
 42602 Use of unbudgeted funds  
 42610 Appropriation of excess funds and limitation thereon  
 45253 Annual budget of personnel commission  
 45254 First year budget of personnel commission  
 52060-52077 Local control and accountability plan

GOVERNMENT CODE

7900-7914 Appropriations limit

CODE OF REGULATIONS, TITLE 5

15060 Standardized account code structure  
 15440-15451 Criteria and standards for school district budgets  
 15494-15496 Local control funding formula, expenditures

*Management Resources:*CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS

California School Accounting Manual

New Requirements for Reporting Fund Balance in Governmental Funds, January 7, 2011

FISCAL CRISIS AND MANAGEMENT ASSISTANCE TEAM PUBLICATIONS

Fiscal Oversight Guide for AB 1200, AB 2756 and Subsequent Related Legislation, September 2006

GOVERNMENT FINANCE OFFICERS ASSOCIATION

Best Practice: Appropriate Level of Unrestricted Fund Balance in the General Fund, 2009

GOVERNMENTAL ACCOUNTING STANDARDS BOARD STATEMENTS

Statement 54, Fund Balance Reporting and Governmental Fund Type Definitions, March 2009

Statement 45, Accounting and Financial Reporting by Employers for Post-employment Benefits Other Than Pensions, June 2004

Statement 34, Basic Financial Statements and Management's Discussion and Analysis - For State and Local Governments, June 1999

WEB SITES

CSBA: <http://www.csba.org>

Association of California School Administrators: <http://www.acsa.org>

California Department of Education, Finance and Grants: <http://www.cde.ca.gov/fg>

California Department of Finance: <http://www.dof.ca.gov>

Fiscal Crisis and Management Assistance Team: <http://www.fcmat.org>

Government Finance Officers Association: <http://www.gfoa.org>

Governmental Accounting Standards Board: <http://www.gasb.org>

School Services of California, Inc.: <http://www.sscal.com>

# CSBA Sample

## Administrative Regulation

**Business and Noninstructional Operations**

AR 3100(a)

### **BUDGET**

#### **Budget Advisory Committee**

Membership of the district's budget advisory committee may include representatives of each of the following groups:

1. Governing Board members, provided that less than a majority of the Board serves on the committee

*(cf. 9140 - Board Representatives)*

2. District and school site administrators

3. Representatives of bargaining units

4. Certificated and/or classified staff

5. Parents/guardians

6. Representatives of the business community and/or other community members

*(cf. 1220 - Citizen Advisory Committees)*

*(cf. 2230 - Representative and Deliberative Groups)*

*(cf. 9130 - Board Committees)*

The committee's duties may include, but not necessarily be limited to:

1. Making recommendations regarding budget priorities
2. Recommending cost reduction strategies, such as identifying services that may be reduced, made more efficient, or discontinued
3. Reviewing the clarity and effectiveness of budget documents and communications
4. Presenting progress reports on the committee's work and a final report of recommendations to the Superintendent or designee and to the Board

The specific duties of the committee shall be clearly defined and presented to each member in writing, along with any background information necessary for the successful completion of the committee's charges, the timelines for reporting the committee's progress, and timelines for completion of each task.

*(cf. 3350 - Travel Expenses)*

AR 3100(b)

**BUDGET** (continued)

**Public Hearing**

The agenda for the public hearing on the district budget shall be posted at least 72 hours before the hearing and shall indicate the location where the budget may be inspected. The proposed budget shall be available for public inspection at least three working days before this hearing. (Education Code 42103, 42127, 52062)

*(cf. 0460 - Local Control and Accountability Plan)*

*(cf. 9320 - Meetings and Notices)*

*(cf. 9322 - Agenda/Meeting Materials)*

The Superintendent or designee shall notify the County Superintendent of Schools of the location, dates, and times at which the proposed budget may be inspected, as well as the location, date, and time of the public hearing, in sufficient time for the County Superintendent to publish such information in a newspaper of general circulation at least 10 days but not more than 45 days before the hearing as required by Education Code 42103.

Whenever the proposed district budget includes a combined assigned and unassigned ending fund balance that exceeds the minimum recommended reserve for economic uncertainties adopted by the State Board of Education, the district shall provide, for each fiscal year included in the budget, the following information for public review and discussion at the public hearing: (Education Code 42127; 5 CCR 15450)

1. The minimum recommended reserve for economic uncertainties
2. The combined assigned and unassigned ending fund balances that are in excess of the minimum recommended reserve
3. A statement of reasons substantiating the need for the combined assigned and unassigned ending balances that are in excess of the minimum recommended reserve

During the hearing, any district resident may speak to the proposed budget or to any item in the budget. The hearing may conclude when all residents who have requested to be heard have had the opportunity to speak. (Education Code 42103)

*(cf. 9323 - Meeting Conduct)*

**Budget Review Committee for Disapproved Budgets**

If the district's budget is disapproved by the County Superintendent for any reason other than his/her disapproval of the district's local control and accountability plan (LCAP) or annual update to the LCAP, the budget shall be reviewed by a budget review committee, unless the Board and County Superintendent agree to waive the requirement and the California Department of Education accepts the waiver. (Education Code 42127)

This committee shall consist of either: (Education Code 42127.1, 42127.2)

1. Three persons selected by the Board from a list of candidates provided by the Superintendent of Public Instruction (SPI), who shall be selected within five working days after receiving the list of candidates

AR 3100(c)

**BUDGET** (continued)

2. A regional review committee convened by the County Superintendent with the approval of the Board

If the budget review committee recommends disapproval of the district budget, the Board may submit a response to the SPI no later than five working days after receipt of the committee's report. The response may include any revisions to the adopted final budget and any other proposed actions to be taken as a result of the committee's recommendations. (Education Code 42127.3)

If the SPI disapproves the district budget after reviewing the committee's report and the district's response, the Board shall consult with the County Superintendent as he/she develops and adopts, by ~~November 30~~ **December 31**, a fiscal plan and budget that will allow the district to meet its financial obligations. For the current fiscal year, the district shall operate in accordance with the budget adopted by the County Superintendent. (Education Code 42127.3)

Until the district receives approval of its budget, it shall continue to operate either on the basis of the prior year's budget or on the basis of the current year's unapproved budget as adopted and revised by the Board, whichever budget contains a lower total spending authority. (Education Code 42127.4)

# CSBA Sample Board Policy

**Business and Noninstructional Operations**            BP 3230(a)

## **FEDERAL GRANT FUNDS**

The Governing Board recognizes the district's responsibility to maintain fiscal integrity and transparency in the use of all funds awarded through federal grants. The district shall comply with all requirements detailed in any grant agreement with an awarding agency and with the federal Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards specified in 7 CFR 200.0-200.521 and any stricter state laws and district policy.

Any goods or services purchased with federal funds shall be reasonable in cost and necessary for the proper and efficient performance or administration of the program.

The Superintendent or designee shall ensure that the district's financial management systems and procedures provide for the following: (2 CFR 200.302)

1. Identification in district accounts of each federal award received and expended and the federal program under which it was received

*(cf. 3100 - Budget)*

2. Accurate, current, and complete disclosure of the financial and performance results of each federal award or program in accordance with the reporting requirements of 2 CFR 200.327 and 200.328

*(cf. 3460 - Financial Reports and Accountability)*

3. Records and supporting documentation that adequately identify the source and application of funds for federally funded activities, including information pertaining to federal awards, authorizations, obligations, unobligated balances, assets, expenditures, income, and interest

*(cf. 1340 - Access to District Records)*

*(cf. 3580 - District Records)*

4. Effective controls and accountability for all funds, property, and other assets and assurance that all assets are used solely for authorized purposes
5. Comparison of actual expenditures with budgeted amounts for each federal award
6. Written procedures to implement provisions governing payments as specified in 2 CFR 200.305
7. Written procedures for determining the allowability of costs in accordance with 2 CFR 200.400-200.475 and the terms and conditions of the federal grant award

*(cf. 3400 - Management of District Assets/Accounts)*

BP 3230(b)

**FEDERAL GRANT FUNDS** (continued)

The Superintendent or designee shall develop and implement appropriate internal control processes to reasonably assure that transactions are properly executed, recorded, and accounted for so that the district can prepare reliable financial statements and federal reports, maintain accountability over assets, and demonstrate compliance with federal laws, regulations, and conditions of the federal award. (2 CFR 200.61, 200.62, 200.303)

Equipment purchased with federal funds shall be properly inventoried and adequately maintained to safeguard against loss, damage, or theft of the property.

*(cf. 3270 - Sale and Disposal of Books, Equipment and Supplies)*

*(cf. 3440 - Inventories)*

*(cf. 3512 - Equipment)*

All staff involved in the administration or implementation of programs and activities supported by federal funds shall receive information and training on the allowable use of federal funds, purchasing procedures, and reporting processes commensurate with their duties.

*(cf. 4131 - Staff Development)*

*(cf. 4231 - Staff Development)*

*(cf. 4331 - Staff Development)*

The district shall submit performance reports to the awarding agency in accordance with the schedule and indicators required for that federal grant by law and the awarding agency. As required, such reports may include a comparison of actual accomplishments to the objectives of the federal award, the relationship between financial data and performance accomplishments, the reasons that established goals were not met if applicable, cost information to demonstrate cost effective practices, analysis and explanation of any cost overruns or high unit costs, and other relevant information. The final performance report shall be submitted within 90 days after the ending date of the grant. (2 CFR 200.301, 200.328)

*(cf. 0500 - Accountability)*

*(cf. 6190 - Evaluation of the Instructional Program)*

*Legal Reference:*EDUCATION CODE

42122-42129 Budget requirements

CODE OF FEDERAL REGULATIONS, TITLE 2

180.220 Amount of contract subject to suspension and debarment rules

200.0-200.521 Federal uniform grant guidance, especially:

200.1-200.99 Definitions

200.100-200.113 General provisions

200.317-200.326 Procurement standards

200.327-200.329 Monitoring and reporting

200.333-200.337 Record retention

200.400-200.475 Cost principles

200.500-200.521 Audit requirements

CODE OF FEDERAL REGULATIONS, TITLE 34

76.730-76.731 Records related to federal grant programs

CODE OF FEDERAL REGULATIONS, TITLE 48

2.101 Federal acquisition regulation; definitions



BP 3230(c)

**FEDERAL GRANT FUNDS (continued)***Management Resources:*CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONSCalifornia Department of Education Audit GuideCalifornia School Accounting ManualEDUCATION AUDIT APPEALS PANEL PUBLICATIONSGuide for Annual Audits of K-12 Local Education Agencies and State Compliance ReportingU.S. DEPARTMENT OF EDUCATION PUBLICATIONSQuestions and Answers Regarding 2 CFR Part 200, March 17, 2016WEB SITESCalifornia Department of Education: <http://www.cde.ca.gov>Education Audit Appeals Panel: <http://www.eaap.ca.gov>Office of Management and Budget, Uniform Guidance: [https://www.whitehouse.gov/omb/grants\\_docs](https://www.whitehouse.gov/omb/grants_docs)State Controller's Office: <http://www.sco.ca.gov>System for Award Management (SAM): [www.sam.gov/portal/SAM/##11](http://www.sam.gov/portal/SAM/##11)U.S. Department of Education: <http://www.ed.gov>U.S. Government Accountability Office: <http://www.gao.gov>

# CSBA Sample Administrative Regulation

**Business and Noninstructional Operations** AR 3230(a)

## FEDERAL GRANT FUNDS

### Allowable Costs

Prior to obligating or spending any federal grant funds, the Superintendent or designee shall determine whether a proposed purchase is an allowable expenditure of federal funds in accordance with 2 CFR 200.400-200.475 and the terms and conditions of the federal grant award. He/she shall also determine whether the expense is a direct or indirect cost as defined in 2 CFR 200.413 and 200.414 and, if the purchase will benefit other programs not included in the grant award, the appropriate share to be allocated to the federal grant.

*(cf. 3350 - Travel Expenses)*

The Superintendent or designee shall review and approve all transactions involving federal grant funds and shall ensure the proper coding of expenditures consistent with the California School Accounting Manual.

*(cf. 3300 - Expenditures and Purchases)*

*(cf. 3314 - Payment for Goods and Services)*

### Period of Performance

All obligations of federal funds shall occur on or between the beginning and ending dates of the grant project and shall be paid no later than 90 days after the end of the funding period, unless specifically authorized by the grant award to be carried over beyond the initial term of the grant. (2 CFR 200.77, 200.308, 200.309, 200.343)

### Procurement

On or before July 1, 2017, or such later date as may be approved in the Uniform Guidance, the Superintendent or designee shall comply with the standards specified in 2 CFR 200.317-200.326 and Appendix II of Part 200 when procuring goods and services needed to carry out a federal grant as well as any more restrictive state laws and district policies concerning the procurement of goods and services.

As appropriate to encourage greater economy and efficiency, the Superintendent or designee shall avoid acquisition of unnecessary or duplicative items, give consideration to consolidating or breaking out procurements, analyze lease versus purchase alternatives, consider entering into an interagency agreement for procurement of common or shared goods and services, and/or use federal excess or surplus property. (2 CFR 200.318)

The procurement of goods or services with federal funds shall be conducted in a manner that provides full and open competition in accordance with state laws and district regulations and the following requirements:

1. Any purchase of supplies or services that does not exceed the "micro-purchase" threshold specified in 48 CFR 2.101 may be awarded without soliciting competitive

AR 3230(b)

**FEDERAL GRANT FUNDS** (continued)

quotes, provided that the district considers the price to be reasonable and maintains written evidence of this reasonableness in the record of all micro-purchases. (2 CFR 200.67, 200.320)

2. For any purchase that exceeds the micro-purchase threshold but is less than the bid limit required by Public Contract Code 20111, the Superintendent or designee shall utilize "small-purchase" procedures that include obtaining price or rate quotes from an adequate number of qualified sources. (2 CFR 200.320)
3. Contracts for goods or services over the bid limits required by Public Contract Code 20111 shall be awarded pursuant to California law and AR 3311 - Bids, unless exempt from bidding under the law.

(*cf. 3311 - Bids*)

4. If a purchase is exempt from bidding and the district's solicitation is by a request for proposals, the award may be made by either a fixed-price or cost-reimbursement type contract awarded to the entity whose proposal is most advantageous to the program, with price and other factors considered. (2 CFR 200.320)

(*cf. 3312 - Contracts*)

5. Procurement by noncompetitive proposals (sole sourcing) may be used only when the item is available from a single source, the need or emergency will not permit a delay resulting from competitive solicitation, the awarding agency expressly authorizes sole sourcing in response to the district's request, and/or competition is determined inadequate after solicitation of a number of sources. (2 CFR 200.320)
6. Time and materials type contracts may be used only after a determination that no other contract is suitable and if the contract includes a ceiling price that the contractor exceeds at its own risk. *Time and materials type contract* means a contract whose cost is the sum of the actual cost of materials and direct labor hours charged at fixed hourly rates that reflect wages, general administrative expenses, and profit. (200.328)

For any purchase of \$25,000 or more, the Superintendent or designee shall verify that any vendor which is used to procure goods or services is not excluded or disqualified by the federal government. (2 CFR 180.220, 200.213)

All solicitations shall incorporate a clear and accurate description of the technical requirements for the material, product, or service to be procured. Such description shall not, in competitive procurements, contain features which unduly restrict competition. The description shall avoid detailed product specifications to the extent possible, but may include a statement of the qualitative nature of the material, product, or service to be procured and, when necessary, shall set forth those minimum essential characteristics and standards to which it must conform if it is to satisfy its intended use. When it is impractical or not economical to make a clear and accurate description of the technical requirements, a brand name or equivalent description may be used to define the performance or other salient requirements of procurement, clearly stating the specific features of the named brand which must be met by offers. In addition, every solicitation shall identify all requirements which the offer must fulfill and any other factors to be used in evaluating bids or proposals. (2 CFR 200.319)

The Superintendent or designee shall maintain sufficient records to document the procurement, including, but not limited to, the rationale for the method of procurement, selection of the contract type, contractor selection or rejection, and the basis for the contract price. (2 CFR 200.318)

AR 3230(c)

### **FEDERAL GRANT FUNDS (continued)**

The Superintendent or designee shall ensure that all contracts for purchases using federal grant funds contain the applicable contract provisions described in Appendix II to Part 200 - Contract Provisions for Non-Federal Entity Contracts Under Federal Awards. (2 CFR 200.326)

### **Capital Expenditures**

The Superintendent or designee shall obtain prior written approval from the awarding agency before using federal funds to make capital expenditures, including the acquisition of land, facilities, equipment, and intellectual property and expenditures to make additions, improvements, modifications, replacements, rearrangements, reinstallations, renovations, or alterations to capital assets that materially increase their value or useful life. (2 CFR 200.12, 200.13, 200.20, 200.33, 200.48, 200.58, 200.89, 200.313, 200.439)

### **Conflict of Interest**

No Governing Board member, district employee, or district representative shall participate in the selection, award, or administration of a contract supported by federal funds if he/she has a real or apparent conflict of interest, such as when he/she or a member of his/her immediate family, his/her partner, or an organization which employs or is about to employ any of them has a financial interest in or a tangible personal benefit from a firm considered for a contract. Such persons are prohibited from soliciting or accepting gratuities, favors, or anything of monetary value from contractors or subcontractors unless the gift is an unsolicited item of nominal value. (2 CFR 200.318)

Employees engaged in the selection, award, and administration of contracts shall also comply with BB 9270 - Conflict of Interest.

*(cf. 9270 - Conflict of Interest)*

### **Cash Management**

The Superintendent or designee shall ensure the district's compliance with 2 CFR 200.305 pertaining to payments and cash management, including compliance with applicable methods and procedures that minimize the time elapsing between the transfer of funds to the district and the district's disbursement of funds. (2 CFR 200.305)

When authorized by law, the district may receive advance payments of federal grant funds, limited to the minimum amounts needed and timed in accordance with the actual immediate cash requirements of the district for carrying out the purpose of the program or project. Except under specified conditions, the district shall maintain the advance payments in an interest-bearing account. The district shall remit interest earned on the advanced payment to the awarding agency on an annual basis, but may retain interest amounts specified in 2 CFR 200.305 for administrative expenses. (2 CFR 200.305)

When required by the awarding agency, the district shall instead submit a request for reimbursement of actual expenses incurred. The district may also request reimbursement as an alternative to receiving advance payments. (2 CFR 200.305)

The Superintendent or designee shall maintain source documentation supporting the expenditure of federal funds, such as invoices, time sheets, payroll stubs, or other appropriate documentation.

AR 3230(d)

## **FEDERAL GRANT FUNDS** (continued)

### **Personnel**

All district employees who are paid in full or in part with federal funds, including employees whose salary is paid with state or local funds but is used to meet a required match or in-kind contribution to a federal program, shall document the amount of time they spend on grant activities. (2 CFR 200.430)

### **Records**

Except as otherwise provided in 2 CFR 200.333, or where state law or district policy requires a longer retention period, financial records, supporting documents, statistical records, and all other district records related to a federal award shall be retained for a period of three years from the date of submission of the final expenditure report or, for a federal award that is renewed quarterly or annually, from the date of the submission of the quarterly or annual financial report. (2 CFR 200.333)

*(cf. 1340 - Access to District Records)*

*(cf. 3580 - District Records)*

### **Audits**

Whenever the district expends \$750,000 or more in federal grant funds during a fiscal year, it shall arrange for either a single audit or a program-specific audit in accordance with 2 CFR 200.507 or 200.514. (2 CFR 200.501)

The Superintendent or designee shall ensure that the audit meets the requirements specified in 2 CFR 200.500-200.521.

Specified records pertaining to the audit of federal funds expended by the district shall be transmitted to the clearinghouse designated by the federal Office of Management and Budget and shall be made available for public inspection. Such records shall be transmitted within 30 days after receipt of the auditor's report or within nine months after the end of the audit period, whichever is sooner, unless a longer period is agreed to in advance by the federal agency or a different period is specified in a program-specific audit guide. (2 CFR 200.512)

In the event that the audit identifies any deficiency, the Superintendent or designee shall promptly act to either correct the identified deficiency, produce recommended improvements, or demonstrate that the audit finding is invalid or does not warrant action. (2 CFR 200.26, 200.508, 200.511)

# CSBA Sample Board Policy

## Business and Noninstructional Operations

BP 3260(a)

### FEES AND CHARGES

Note: Pursuant to Education Code 49011, a district is prohibited from requiring students to pay a fee, deposit, or other charge in order to participate in an educational activity as defined in Education Code 49010. A district is also required to provide the supplies, materials, and equipment needed by students to participate in educational activities. **Additionally**, Education Code 49011 clarifies that an otherwise impermissible fee would not be made permissible by the provision of a waiver for some students. However, pursuant to 5 CCR 350, a district is permitted, in certain circumstances, to impose fees that are specifically authorized by law. See the accompanying administrative regulation for a list of permissible fees.

The Governing Board recognizes its responsibility to ensure that books, materials, equipment, supplies, and other resources necessary for students' participation in the district's educational program are made available to them at no cost.

No student shall be required to pay a fee, deposit, or other charge for his/her participation in an educational activity which constitutes an integral fundamental part of the district's educational program, including curricular and extracurricular activities. (Education Code 49010, 49011; 5 CCR 350)

*(cf. 3100 - Budget)*

*(cf. 6145 - Extracurricular and Cocurricular Activities)*

As necessary, the Board may approve fees, deposits, and other charges which are specifically authorized by law. When approving such fees, deposits, or charges, establishing fee schedules, or determining whether waivers or exceptions should be granted, the Board shall consider relevant data, including the socioeconomic conditions of district students' families and their ability to pay.

*(cf. 3250 - Transportation Fees)*

*(cf. 3515.4 - Recovery for Property Loss or Damage)*

*(cf. 3553 - Free and Reduced Price Meals)*

*(cf. 5143 - Insurance)*

*(cf. 9323.2 - Actions by the Board)*

The prohibition against student fees shall not restrict the district from soliciting for **voluntary** donations, participating in fundraising activities, **and or** providing prizes or other recognition for participants in such activities and events. **The Superintendent or designee shall emphasize that participation of students, parents/guardians, district employees, volunteers, or educational or civic organizations in such activities and events is voluntary.** However, **t**The district shall not offer or award to a student any course credit or privileges related to educational activities in exchange for voluntary donations or participation in fundraising activities by or on behalf of the student. **It also and** shall not remove, or threaten to remove, from a student any course credit or privileges related to educational activities, or otherwise discriminate against the student, due to a lack of voluntary donations or participation in fundraising activities by or on behalf of the student.

*(cf. 1321 - Solicitation of Funds from and by Students)*

*(cf. 3290 - Gifts, Grants and Bequests)*

BP 3260(b)

**FEES AND CHARGES** (continued)

The Superintendent or designee may provide additional information or professional development opportunities to administrators, teachers, and other personnel regarding permissible fees.

*(cf. 4131 - Staff Development)*

*(cf. 4231 - Staff Development)*

*(cf. 4331 - Staff Development)*

**Complaints**

Note: Pursuant to Education Code 49013, a district is mandated to adopt policy **and procedures** which allow complaints to be filed using the uniform complaint procedures when the district is alleged to have violated the prohibition against requiring unauthorized student fees. See BP/AR 1312.3 - Uniform Complaint Procedures for language implementing this mandate.

A complaint alleging district noncompliance with the prohibition against requiring student fees, deposits, or other charges shall be filed in accordance with the district's procedures in BP/AR 1312.3 - Uniform Complaint Procedures. (Education Code 49013)

*(cf. 1312.3 - Uniform Complaint Procedures)*

If, upon investigation, the district finds merit in the complaint, the Superintendent or designee shall recommend and the Board shall adopt an appropriate remedy to be provided to all affected students and parents/guardians in accordance with 5 CCR 4600.

Information related to the prohibition against requiring students to pay fees for participation in an educational activity shall be included in the district's annual notification **of uniform complaint procedures required** to be provided to all students, parents/guardians, employees, and other interested parties pursuant to 5 CCR 4622. (Education Code 49013)

*(cf. 4112.9/4212.9/4312.9 - Employee Notifications)*

*(cf. 5145.6 - Parental Notifications)*

*Legal Reference:***EDUCATION CODE**

8239 *Preschool and wraparound child care services*

8250 *Child care and development services for children with disabilities*

8263 *Child care eligibility*

**8422 21st Century High School After School Safety and Enrichment for Teens programs**

8482.6 *After School Education and Safety programs*

8760-8774 *Outdoor science and conservation programs*

17453.1 *District sale or lease of Internet appliances or personal computers to students or parents*

17551 *Property fabricated by students*

19910-19911 *Offenses against libraries*

32033 *Eye protective devices*

32221 *Insurance for athletic team member*

32390 *Fingerprinting program*

35330-35332 *Excursions and field trips*

35335 *School camp programs*

BP 3260(c)

**FEES AND CHARGES (continued)**

38080-38086.1 Cafeteria establishment and use  
 38120 Use of school band equipment on excursions to foreign countries  
 39801.5 Transportation for adults  
 39807.5 Payment of transportation costs  
 39837 Transportation of students to places of summer employment  
 48050 Residents of adjoining states  
 48052 Tuition for foreign residents  
 48904 Liability of parent or guardian  
 49010-49013 Student fees  
 49065 Charge for copies  
 49066 Grades, effect of physical education class apparel  
 49091.14 Prospectus of school curriculum  
 51810-51815 Community service classes  
 52612 Tuition for adult classes  
 52613 Nonimmigrant **foreign nationals** aliens  
 56504 School records; students with disabilities  
 60410 Students in classes for adults

**GOVERNMENT CODE**

6253 Request for copy; fee

**CALIFORNIA CONSTITUTION**

Article 9, Section 5 Common school system

**CODE OF REGULATIONS, TITLE 5**

350 Fees not permitted

4600-4687 Uniform complaint procedures

**UNITED STATES CODE, TITLE 8**

1184 Foreign students

**COURT DECISIONS**Driving School Assn of CA v. San Mateo Union HSD (1993) 11 Cal. App. 4th 1513Arcadia Unified School District v. State Department of Education (1992) 2 Cal 4th 251Steffes v. California Interscholastic Federation (1986) 176 Cal. App. 3d 739Hartzell v. Connell (1984) 35 Cal. 3d 899CTA v. Glendale School District Board of Education (1980) 109 Cal. App. 3d 738**Management Resources:****CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS****Pupil Fees: Damage to School Property, Fiscal Management Advisory 16-01, September 16, 2016****Pupil Fees: Parent Service Hours, Fiscal Management Advisory 15-01, January 20, 2015****Pupil Fees, Deposits, and Other Charges: Cap and Gown for High School Graduation Ceremony, Addendum to Fiscal Management Advisory 12-02, October 4, 2013****Fees, Deposits and Other Charges, Fiscal Management Advisory 12-02, April 24, 2013****WEB SITES**CSBA: <http://www.csba.org>California Department of Education: <http://www.cde.ca.gov>



# CSBA Sample Administrative Regulation

## Business and Noninstructional Operations

AR 3260(a)

### FEES AND CHARGES

Pursuant to Education Code 49011, a district is prohibited from requiring a student to pay fees or charges in order to participate in an educational activity. A complaint alleging the unauthorized charging of student fees may be filed in accordance with the uniform complaint procedures; see the accompanying Board policy and BP/AR 1312.3 - Uniform Complaint Procedures. Districts with questions as to whether a particular fee may be charged should consult with legal counsel.

When approved by the Governing Board, the Superintendent or designee may impose a fee for the following: (5 CCR 350)

1. Insurance for athletic team members, with an exemption providing for the district to pay the cost of the insurance for any team member who is financially unable to pay (Education Code 32221)

*(cf. 5143 - Insurance)*

2. Insurance for medical or hospital service for students participating in field trips and excursions (Education Code 35331)

3. Expenses of students' participation in a field trip or excursion **within the state or** to another state, the District of Columbia, or a foreign country, as long as no student is prohibited from making the field trip due to lack of funds (Education Code 35330)

*(cf. 6153 - School-Sponsored Trips)*

4. Student fingerprinting program, as long as the fee does not exceed the actual costs associated with the program (Education Code 32390)

*(cf. 5142.1 - Identification and Reporting of Missing Children)*

5. School camp programs in outdoor science education, conservation education, or forestry operated pursuant to Education Code 8760-8774, provided that the fee is not mandatory and no student is denied the opportunity to participate for nonpayment of the fee (Education Code 35335)

*(cf. 6142.5 - Environmental Education)*

Note: Education Code 17551 permits the district to sell to a student any nonperishable property of the district which has been fabricated by the student, as provided in item #6 below. **California Department of Education (CDE)** Fiscal Management Advisory 12-02 clarifies that this cost applies to materials the student will take home for his/her own possession and use, such as wood shop, art, or sewing projects.

AR 3260(b)

**FEES AND CHARGES** (continued)

6. Reimbursement for the direct cost of materials provided by the district to a student for the fabrication of nonperishable personal property the student will take home for his/her own possession and use, such as wood shop, art, or sewing projects kept by the student (Education Code 17551)

7. Home-to-school transportation and transportation between regular, full-time day schools and regional occupational centers, programs, or classes, as long as the fee does not exceed the statewide average nonsubsidized cost per student and exemptions are made for indigent and disabled students (Education Code 39807.5)

*(cf. 3250 - Transportation Fees)*

8. Transportation for students to and from their places of employment in connection with any summer employment program for youth (Education Code 39837)

9. Deposit for school band instruments, music, uniforms, and other regalia which school band members take on excursions to foreign countries (Education Code 38120)

10. Sale or lease of Internet appliances or personal computers **or of Internet appliances that allow a person to connect to or access the district's educational network**, for the purpose of providing access to the district's educational computer network, **provided that the items are sold or leased to parents/guardians** at no more than cost, **as long as and** the district provides network access for families who cannot afford it (Education Code 17453.1)

*(cf. 0440 - District Technology Plan)*

*(cf. 6163.4 - Student Use of Technology)*

11. **Fees for any An adult education or secondary school** community service class in civic, vocational, illiteracy, health, homemaking, and technical and general education, not to exceed the cost of maintaining the class (Education Code 51810, ~~51815~~)

*(cf. 6142.4 - Service Learning/Community Service Classes)*

12. Eye safety devices worn in courses or activities involving the use of hazardous substances likely to cause injury to the eyes, when being sold to students and/or teachers or instructors to keep and at a price not to exceed the district's actual costs (Education Code 32033)

*(cf. 3514.1 - Hazardous Substances)*

*(cf. 5142 - Safety)*

13. Actual cost of furnishing copies of any student's records, except that no charge shall be made for furnishing up to two transcripts or two verifications of a former student's records or for reproducing records of a student with a disability when the cost would effectively prevent the parent/guardian from exercising the right to receive the copies (Education Code 49065, 56504)

*(cf. 5125 - Student Records)*

AR 3260(c)

**FEES AND CHARGES** (continued)

14. Actual costs of duplication for reproduction of the prospectus of school curriculum or for copies of public records (Education Code 49091.14; Government Code 6253)

*(cf. 1340 - Access to District Records)*

*(cf. 5020 - Parent Rights and Responsibilities)*

15. Food sold at school, subject to free and reduced-price meal program eligibility and other restrictions specified in law (Education Code 38084)

*(cf. 3550 - Food Service/Child Nutrition Program)*

*(cf. 3551 - Food Service Operations/Cafeteria Funds)*

*(cf. 3552 - Summer Meal Program)*

*(cf. 3553 - Free and Reduced Price Meals)*

*(cf. 3554 - Other Food Sales)*

16. As allowed in law, replacement cost or reimbursement for lost or **willfully** damaged district books, supplies, or property, or for district property loaned to a student that he/she fails to return (Education Code 19910-19911, 48904)

*(cf. 3515.4 - Recovery for Property Loss or Damage)*

17. Tuition for district school attendance by an out-of-state or out-of-country resident (Education Code 48050, 48052, 52613; 8 USC 1184)

*(cf. 5111.2 - Nonresident Foreign Students)*

18. Adult education books, materials, transportation, and classes, except that no fee may be charged for classes in elementary subjects, **or classes** for which high school credit is granted when taken by a person who does not hold a high school diploma, **or, effective July 1, 2015,** classes in English and citizenship (Education Code 39801.5, 52612, 60410)

*(cf. 6200 - Adult Education)*

19. Preschool and child care and development services, in accordance with the fee schedule established by the Superintendent of Public Instruction, unless the family qualifies for subsidized services or the program is for severely disabled children and the student is eligible to enroll in it (Education Code 8239, 8250, 8263)

*(cf. 5148 - Child Care and Development)*

*(cf. 5148.3 - Preschool/Early Childhood Education)*

20. **After School Education and Safety Programs as long as no eligible student is denied the ability to participate because of inability to pay the fee Participation in a before-school or after-school program that is funded as an After School Education and Safety (ASES) program, 21st Century Community Learning Center (21st CCLC), or 21st Century High School After School Safety and Enrichment for Teens program, provided that fees are waived or reduced for families with students who are eligible for free or reduced-price meals and, in regard to ASES and 21st CCLC programs, fees are not charged if the district knows the student is a homeless or foster youth** (Education Code **8422,** 8482.6)

AR 3260(d)

**FEES AND CHARGES** (continued)

*(cf. 5148.2 - Before/After School Programs)*

*(cf. 6173 - Education for Homeless Children)*

*(cf. 6173.1 - Education for Foster Youth)*

21. Advanced Placement and International Baccalaureate Diploma examinations for college credits, as long as the examination is not a course requirement and the results have no impact on student grades or credits in the course

*(cf. 6141.4 - International Baccalaureate Program)*

*(cf. 6141.5 - Advanced Placement)*

# CSBA Sample Board Policy

## Business and Noninstructional Operations

BP 3270(a)

### SALE AND DISPOSAL OF BOOKS, EQUIPMENT AND SUPPLIES

The Governing Board recognizes its fiscal responsibility to maximize the use of district equipment, supplies, instructional materials, and other personal property while providing up-to-date resources that facilitate student learning and effective district operations. When the Board, upon recommendation of the Superintendent or designee, declares any district-owned personal property unusable, obsolete, or no longer needed, the Board shall determine the estimated value of the property and shall decide whether the property will be donated, sold, or otherwise disposed of as prescribed by law and administrative regulation.

*(cf. 0440 - District Technology Plan)*

*(cf. 3512 - Equipment)*

*(cf. 6161.11 - Supplementary Instructional Materials)*

*(cf. 6163.1 - Library Media Centers)*

The Board shall approve the price and terms of any sale or lease of personal property of the district.

If the Board members who are in attendance at a meeting unanimously agree that the property, whether one or more items, does not exceed \$2,500 in value, the property may be sold without advertising for bids. (Education Code 17546)

#### ***(cf. 9323.2 - Actions by the Board)***

If the Board members who are in attendance at a meeting unanimously find that the value of the property is insufficient to defray the costs of arranging a sale, the property may be donated to a charitable organization deemed appropriate by the Board or may be disposed of in the local public dump. (Education Code 17546)

Instructional materials shall be considered obsolete or unusable by the district if they have been replaced by more recent editions or new materials selected by the Board, are not aligned with the district's academic standards or course of study, and have no foreseeable value in other instructional areas. Such materials may be sold or donated if they continue to serve educational purposes that would benefit others outside the district. Instructional materials are not appropriate for sale or donation if they meet any of the following criteria:

1. Contain information rendered inaccurate or incomplete by new research or technologies
2. Contain demeaning, stereotyping, or patronizing references to any group of persons protected against discrimination by law or Board policy
3. Are damaged beyond use or repair

*(cf. 0410 - Nondiscrimination in District Programs and Activities)*

*(cf. 1312.4 - Williams Uniform Complaint Procedures)*

***(cf. 6161.1 - Selection and Evaluation of Instructional Materials)***

*(cf. 6011 - Academic Standards)*

*(cf. 6143 - Courses of Study)*

***(cf. 6161.1 - Selection and Evaluation of Instructional Materials)***

BP 3270(b)

## SALE AND DISPOSAL OF BOOKS, EQUIPMENT AND SUPPLIES (continued)

The Superintendent or designee shall establish procedures to be used whenever the district sells equipment or supplies originally acquired under a federal grant or subgrant. Such procedures shall be designed to **ensure the highest possible return.** (**34 CFR 80.32 2 CFR 200.313**)

**(cf. 3230 - Federal Grant Funds)**

(cf. 3440 - Inventories)

*Legal Reference:*

EDUCATION CODE

17540-17542 Sale or lease of personal property by one district to another

17545-17555 Sale of personal property

35168 Inventory, including record of time and mode of disposal

60510-60530 Sale, donation, or disposal of instructional materials

GOVERNMENT CODE

25505 District property; disposition; proceeds

CODE OF REGULATIONS, TITLE 5

3944 Consolidated categorical programs, district title to equipment

3946 Disposal of equipment purchased with state and federal consolidated application funds

UNITED STATES CODE, TITLE 40

549 Surplus property

**CODE OF FEDERAL REGULATIONS, TITLE 2**

**200.0-200.521 Federal uniform grant guidance**

**CODE OF FEDERAL REGULATIONS, TITLE 34**

**80.32-80.33 Equipment and supplies acquired under a grant or subgrant**

*Management Resources:*

CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS

California School Accounting Manual

Standards for Evaluating Instructional Materials for Social Content, 2013

WEB SITES

California Department of Education: <http://www.cde.ca.gov>

School Services of California, Inc.: <http://www.sscal.com>

# CSBA Sample

## Administrative Regulation

### Business and Noninstructional Operations

AR 3270(a)

### SALE AND DISPOSAL OF BOOKS, EQUIPMENT AND SUPPLIES

#### Instructional Materials

Surplus or undistributed obsolete instructional materials that are usable for educational purposes may be sold by the district. Alternatively, such materials may be donated to: (Education Code 60510)

1. Another district, county free library, or other state institution
2. A United States public agency or institution
3. A nonprofit charitable organization
4. Children or adults in California or foreign countries for the purpose of increasing the general literacy of the people

*(cf. 0440 - District Technology Plan)*

*(cf. 6161.1 - Selection and Evaluation of Instructional Materials)*

*(cf. 6161.11 - Supplementary Instructional Materials)*

*(cf. 6163.1 - Library Media Centers)*

Any organization, agency, or institution receiving obsolete instructional materials donated by the district shall certify to the Governing Board that it agrees to make no charge to any persons to whom it gives or lends these materials. (Education Code 60511)

At least 60 days before selling or donating surplus or undistributed obsolete instructional materials, the Superintendent or designee shall notify the public of the district's intention to do so through a public service announcement on a local television station, in a local newspaper, or by other means that will most effectively reach the entities described above. Representatives of those entities and members of the public also shall be notified of the opportunity to address the Board regarding the distribution of these materials.

*(cf. 9323 - Meeting Conduct)*

Surplus or undistributed obsolete instructional materials which are unusable or which cannot be distributed as specified above may be disposed of by either of the following: (Education Code 60530)

1. Mutilated as not to be salable as instructional materials and sold for scrap or for use in the manufacture of paper pulp or other substances at the highest obtainable price
2. Destroyed by any economical means, provided that the materials are not destroyed until at least 30 days after the district has given notice to all persons who have filed a request for such notice

*(cf. 3510 - Green School Operations)*

*(cf. 3511.1 - Integrated Waste Management)*

May 9, 2018

**AR 3270 (b)****SALE AND DISPOSAL OF BOOKS, EQUIPMENT AND SUPPLIES (continued)**

## Equipment/Supplies Acquired with Federal Funds

When the district has a need to replace equipment originally purchased with funds from a federal grant or subgrant, it may, subject to the approval of the agency that awarded the grant, trade in the original equipment or sell the property and use the proceeds to offset the cost of the replacement property. **(34 CFR 80.32 2 CFR 200.313)**

**(cf. 3230 - Federal Grant Funds)**

When any original or replacement equipment or supplies acquired under a federal grant or subgrant are no longer needed for the original project or program or for other federally supported activities, the district may retain or sell such items or, if the item has a current fair market value of less than \$5,000, may otherwise dispose of the item in a manner approved by the Board. Whenever the district sells equipment or supplies that have a current fair market value of \$5,000 or more, it shall provide an amount to the federal agency equal to the agency's share of the current market value of the equipment or the proceeds from the sale of the equipment or supplies. **(34 CFR 80.32-80.33 2 CFR 200.313, 200.314)**

In the event that the district is provided equipment that is federally owned, the district shall request disposition instructions from the federal agency when it no longer needs the equipment. **(34 CFR 80.32 2 CFR 200.313)**

## Other Personal Property

The district may sell other surplus or obsolete district-owned personal property through any of the following methods:

1. The Superintendent or designee may advertise for bids by posting a notice in at least three public places in the district for at least two weeks, or by publishing a notice at least once a week for at least two weeks in a newspaper having a general circulation in the district and, if possible, publishing within the district. The district shall sell the property to the highest responsible bidder or shall reject all bids. (Education Code 17545, 17548)

Property for which no qualified bid has been received may be sold, without further advertising, by the Superintendent or designee. (Education Code 17546)

*(cf. 3311 - Bids)*

2. The property may be sold by means of a public auction conducted by district employees, employees of other public agencies, or by contract with a private auction firm. (Education Code 17545)

3. The district may sell the property without advertising for bids under any of the following conditions:

a. The Board members in attendance at a meeting have unanimously determined that the property does not exceed \$2,500 in value. (Education Code 17546)

*(cf. 9323.2 - Actions by the Board)*



**AR 3270 (b)****SALE AND DISPOSAL OF BOOKS, EQUIPMENT AND SUPPLIES (continued)**

b. The district sells the property to agencies of the federal, state, or local government, to any other school district, or to any agency eligible under the federal surplus property law and the sale price equals the cost of the property plus the estimated cost of purchasing, storing, and handling. (Education Code 17540; 40 USC 549)

c. The district sells or leases the property to agencies of the federal, state, or local government or to any other school district and the price and terms of the sale or lease are fixed by the Board and approved by the County Superintendent of Schools. (Education Code 17542)

Money received from the sale of surplus personal property shall be either deposited in the district reserve or general fund or credited to the fund from which the original purchase was made. (Education Code 17547)

*(cf. 3100 - Budget)*

# CSBA Sample Board Policy

## Business and Noninstructional Operations

BP 3280(a)

### SALE OR LEASE OF DISTRICT-OWNED REAL PROPERTY

The Governing Board believes that the district should utilize its facilities and resources should be utilized in the most an economical and practical manner. The Superintendent or designee shall periodically study the current and projected use of all district facilities to ensure the efficient utilization of space for the effective delivery of instruction.

*(cf. 1330 - Use of School Facilities)*

*(cf. 7110 - Facilities Master Plan)*

*(cf. 7111 - Evaluating Existing Buildings)*

*(cf. 7160 - Charter School Facilities)*

Prior to the sale or lease of any surplus real property, The Board shall appoint a district advisory committee prior to the sale or lease of any surplus real property to advise the Board regarding the use or disposition of schools or school building space which is not needed for school purposes. Rentals of surplus property not exceeding 30 days are exempted from this requirement. When the sale, lease, or rental of surplus property is for the purpose of teacher or other employee housing or for the offering of summer school by a private educational institution, the Board may elect not to appoint a district advisory committee. (Education Code 17388-17389 17387-17391)

*(cf. 1220 - Citizen Advisory Committees)*

Upon determination that district property is no longer needed, or may not be needed until some future time, If the local planning agency has adopted a general plan that affects or includes the area where the surplus property is located, the Board shall first submit a report to the local planning agency as to what real property the district intends to offer for sale or lease describing the location of the surplus property and the purpose and extent of the proposed sale or lease. (Government Code 65402)

The Board shall determine whether the sale or lease of the surplus property is subject to review under the California Environmental Quality Act. (Public Resources Code 21000-21177; 14 CCR 15061-15062)

Not less than 40 days after issuance of the report to the local planning agency, and prior to entering into any agreement for sale or lease of When selling or leasing district real property, the Board shall offer to sell or lease district-owned real property in accordance with comply with the priorities and procedures specified in applicable law. (Education Code 17230, 17387-17391, 17457.5, 17464, 17485-17500 17499; Government Code 54222, 65402)

*(cf. 5148 - Child Care and Development)*

*(cf. 5148.2 - Before/After School Programs)*

*(cf. 5148.3 - Preschool/Early Childhood Education)*

BP 3280(b)

### **SALE OR LEASE OF DISTRICT-OWNED REAL PROPERTY** (continued)

In addition, when selling real property purchased, constructed, or modernized with funds received within the past 10 years from a **state** school facilities funding program, the Board shall consider whether any of the proceeds from the sale will need to be returned to the State Allocation Board (SAB) pursuant to Education Code 17462.3.

#### **Resolution of Intention to Sell or Lease**

Before ordering the sale or lease of any real property, the Board shall adopt a resolution by a two-thirds vote of all of its members at a regularly scheduled open meeting. The resolution shall describe the property proposed to be sold or leased in such a manner as to identify it, specify the minimum price or rent, describe the terms upon which it will be sold or leased, and specify the commission or rate, if any, which the Board will pay to a licensed real estate broker out of the minimum price or rent. The resolution shall fix a time, not less than three weeks thereafter, for a public meeting, held at the Board's regular meeting place, at which sealed proposals to purchase or lease will be received and considered. (Education Code 17466)

*(cf. 9320 - Meetings and Notices)*

*(cf. 9323.2 - Actions by the Board)*

The Superintendent or designee shall provide notice of the adoption of the resolution and of the time and place of the meeting that will be held to consider bids by posting copies of the resolution, signed by the Board, in three public places not less than 15 days before the date of the meeting. In addition, the notice shall be published at least once a week for three successive weeks before the meeting, in a newspaper of general circulation published in the county in which the district is located, if such a newspaper exists. (Education Code 17469)

In accordance with Education Code 17470, the Superintendent or designee shall take reasonable steps to provide notification to the former owners of the property of the district's intent to sell it.

#### **Acceptance/Rejection of Bids**

At the public meeting specified in the resolution of intention to sell or lease property, the Board shall open, examine, and declare all sealed bids. Before accepting a written proposal, the Board shall call for oral bids in accordance with law. (Education Code 17472, 17473)

The Board may reject any and all bids, either written or oral, and withdraw the properties from sale when the Board determines that rejection is in the best public interest. If no proposals are submitted or the submitted proposals do not conform to all the terms and conditions specified in the resolution of intention to lease, the Board may lease the property in accordance with Education Code 17477. (Education Code 17476, 17477)

Of the proposals submitted by responsible bidders which conform to all terms and conditions specified in the resolution of intention to sell or lease, the Board shall finally accept the highest bid after deducting the commission, if any, to be paid to a licensed real estate broker, unless the Board accepts a higher oral bid or rejects all bids. (Education Code 17472)

BP 3280(c)

**SALE OR LEASE OF DISTRICT-OWNED REAL PROPERTY** (continued)

The final acceptance of the bid may be made either at the same meeting specified in the resolution or at any adjourned/continued meeting held within 10 days. Upon acceptance of the bid, the Board may adopt a resolution of acceptance that directs the Board president, or any other Board member, to execute the deed or lease and to deliver the document upon performance and compliance by the successful bidder of all of the terms and conditions of the contract. (Education Code 17475-17478)

*(cf. 1431 - Waivers)*

**Use of Proceeds**

The Superintendent or designee shall ensure that the proceeds from the sale, or lease with an option to purchase, of district surplus district property are used in accordance with law for one-time expenditures and not for ongoing expenditures such as salaries and general operating expenses. (Education Code 17462)

**Proceeds from a sale of surplus district property shall be used for capital outlay or maintenance costs that the Board determines will not recur within a five-year period. (Education Code 17462)**

**Proceeds from a lease of district property with an option to purchase may be deposited into a restricted fund for the routine repair of district facilities, as defined by the SAB, for up to a five-year period. (Education Code 17462)**

**If the Board and SAB determine that the district has no anticipated need for additional sites or building construction for the next 10 years and no major deferred maintenance requirements, the proceeds from the sale or lease with an option to purchase may be deposited in a special reserve fund for the future maintenance and renovation of school sites or in the district's general fund. Proceeds from the sale or lease with option to purchase of district property may also be deposited in a special reserve fund for capital outlay or maintenance costs of district property that the Board determines will not recur within a five-year period. (Education Code 17462)**

*(cf. 3100 - Budget)*

*(cf. 3460 - Financial Reports and Accountability)*

Note: As amended by AB 86 (Ch. 48, Statutes of 2013), Education Code 17463.7 has extended, until January 1, 2016, the authority to use the proceeds from the sale of surplus real property, along with the proceeds from any personal property located on that real property, for any one-time general fund purpose. Districts that choose to exercise this authority will be ineligible for hardship funding from the SAB for five years after the proceeds are deposited.

Prior to exercising this authority, Education Code 17463.7 requires the Board to adopt a plan for expending the resources and to make specific certifications to the SAB, as specified below. Education Code 17463.7 contains additional requirements applicable to the sale of property purchased with proceeds from a local general obligation bond or revenue from developer fees.

Pursuant to the authorization in Education Code 17463.7, the district may expend proceeds from the sale of surplus real property, along with the proceeds from any personal property located on that real property, for any one-time general fund purpose(s). Before the district exercises this authority: (Education Code 17463.7)

1. The Board shall submit documents to the SAB certifying that:

BP 3280(d)

**SALE OR LEASE OF DISTRICT-OWNED REAL PROPERTY** (continued)

a. The district has no major deferred maintenance requirements not covered by existing capital outlay resources.

b. The sale of real property pursuant to Education Code 17463.7 does not violate the provisions of a local bond act.

(cf. 7214 - General Obligation Bonds)

c. The real property is not suitable to meet projected school construction needs for the next 10 years.

2. The Superintendent or designee shall present to the Board, at a regularly scheduled meeting, a plan for expending these one-time resources. The plan shall identify the source and use of the funds and shall describe the reasons that the expenditure shall not result in ongoing fiscal obligations for the district.

*Legal Reference:***EDUCATION CODE**

17219-17224 Acquisition of property not utilized as school site; nonuse payments; exemptions

17230-17234 Surplus property

17385 Conveyances to and from school districts

17387-17391 Advisory committees for use of excess school facilities

17400-17429 Leasing property

17430-17447 Leasing facilities

17453 Lease of surplus district property

17455-17484 Sale or lease of real property, especially:

**17457.5 Offer to charter school**

17462.3 State Allocation Board program to reclaim funds

**17463.7 Proceeds for general fund purposes**

17485-17500 Surplus school playground (Naylor Act)

17515-17526 Joint occupancy

17527-17535 Joint use of district facilities

33050 Request for waiver

38130-38139 Civic Center Act

**GOVERNMENT CODE**

**50001-50002 Definitions**

54220-54232 Surplus land, especially:

54222 Offer to sell or lease property

54950-54963 Brown Act, especially:

54952 Legislative body, definition

**PUBLIC RESOURCES CODE**

21000-21177 California Environmental Quality Act

**CODE OF REGULATIONS, TITLE 2**

1700 Definitions related to surplus property

**COURT DECISIONS**

San Lorenzo Valley Community Advocates for Responsible Education v. San Lorenzo Valley Unified School District, (2006) 139 Cal.App. 4th 1356

Management Resources: (see next page)

BP 3280(e)

**SALE OR LEASE OF DISTRICT-OWNED REAL PROPERTY (continued)**

*Management Resources:*

CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS

Closing a School Best Practices Guide

OFFICE OF PUBLIC SCHOOL CONSTRUCTION PUBLICATIONS

Unused Site Program Handbook, **May 2008 December 2015**

WEB SITES

CSBA: <http://www.csba.org>

California Department of Education, School Facilities Planning Division: <http://www.cde.ca.gov/ls/fa>

Coalition for Adequate School Housing: <http://www.cashnet.org>

Office of Public School Construction: <http://www.dgs.ca.gov/opsc>

# CSBA Sample Board Policy

## Business and Noninstructional Operations

**BP 3311(a)**

### BIDS

The Governing Board is committed to promoting public accountability and ensuring prudent use of public funds. When leasing, purchasing, or contracting for equipment, materials, supplies, or services for the district, including when contracting for public projects involving district facilities, the Board shall explore lawful opportunities to obtain the greatest possible value for its expenditure of public funds. When required by law, or if the Board determines that it is in the best interest of the district, such contracts shall be made using competitive bidding.

*(cf. 0410 - Nondiscrimination in District Programs and Activities)*

*(cf. 3000 - Concepts and Roles)*

***(cf. 3230 - Federal Grant Funds)***

*(cf. 3300 - Expenditures and Purchases)*

***(cf. 3311.1 - Uniform Public Construction Cost Accounting Procedures)***

***(cf. 3311.2 - Lease-Leaseback Contracts)***

***(cf. 3311.3 - Design-Build Contracts)***

***(cf. 3311.4 - Procurement of Technological Equipment)***

No work, project, service, or purchase shall be split or separated into smaller work orders or projects for the purpose of evading legal requirements **regarding contracting after for** competitive bidding. (Public Contract Code 20116, **22033**)

The Superintendent or designee shall establish comprehensive bidding procedures for the district in accordance with law. The procedures shall include a process for advertising bids, instructions and timelines for submitting and opening bids, and other relevant requirements.

For award of contracts which, by law or Board policy, require prequalification, the procedures shall identify a uniform system for rating bidders **and shall address the issues covered by the standardized questionnaire and model guidelines developed by the Department of Industrial Relations pursuant to Public Contract Code 20101 on the basis of a completed questionnaire and financial statements.**

*(cf. 9270 - Conflict of Interest)*

When calling for bids, the Superintendent or designee shall ensure that the bid specifications clearly describes in appropriate detail the quality, delivery, and service required, and includes all information which the district knows, or has in its possession, that is relevant to the work to be performed or that may impact the cost of performing the work.

Except as authorized by law **and specified in the administrative regulation**, contracts shall be let to the lowest responsible bidder who shall give such security as the Board requires, or else all bids shall be rejected. (Public Contract Code 20111)

**BP 3311(b)****BIDS (continued)**

When the Board has determined that it is in the best interest of the district, the district may piggyback onto the contract of another public agency or corporation to lease or purchase **equipment or supplies any personal property** to the extent authorized by law. (Public Contract Code 20118)

**For use in contracting for public works projects, the Board has, by resolution, adopted the procedures set forth in the Uniform Public Construction Cost Accounting Act pursuant to Public Contract Code 22030-22045, including the required cost accounting procedures and the informal bidding procedures when allowed by law. The Board delegates to the Superintendent or designee the responsibilities to award any contract eligible for informal bidding procedures and to develop plans, specifications, and working details for all public projects requiring formal bidding procedures. [MOVED TO BP 3111.1 - UNIFORM PUBLIC CONSTRUCTION COST ACCOUNTING PROCEDURES]**

*Legal Reference:*EDUCATION CODE17070.10-17079.30 *Leroy F. Greene School Facilities Act*17250.10-17250.55 *Design-build contracts*17406 *Lease-leaseback contracts*17595 *Purchase of supplies through Department of General Services*17602 *Purchase of surplus property from federal agencies*38083 *Purchase of perishable foodstuffs and seasonable commodities*38110-38120 *Apparatus and supplies*39802 *Transportation services*BUSINESS AND PROFESSIONS CODE7056 *General engineering contractor*7057 *General building contractor*CODE OF CIVIL PROCEDURE446 *Verification of pleadings*GOVERNMENT CODE4217.10-4217.18 *Energy conservation contracts*4330-4334 *Preference for California-made materials*6252 *Definition of public record*53060 *Special services and advice*54201-54205 *Purchase of supplies and equipment by local agencies*PUBLIC CONTRACT CODE1102 *Emergencies*1103 *Definition, responsible bidder*2000-2002 *Responsive bidders*3000-3010 *Roofing projects*3400 *Bids, specifications by brand or trade name not permitted*3410 *United States produce and processed foods*4113 *Prime contractor; subcontractor*6610 *Bid visits*12200 *Definitions, recycled goods, materials and supplies*20101-20103.7 *Public construction projects, requirements for bidding*20103.8 *Award of contracts*20107 *Bidder's security*20110-20118.4 *Contracting by school districts Local Agency Public Construction Act; school districts*20189 *Bidder's security, earthquake relief*22002 *Definition of public project*2203022000-22045 *Alternative procedures for public projects (UPCCAA)*22050 *Alternative emergency procedures*22152 *Recycled product procurement*

May 9, 2018



**BP 3311(c)**

**BIDS (continued)**

COURT DECISIONS

McGee v. Balfour Beatty Construction, LLC, et al. (4/12/16, No. B262850)

Davis v. Fresno Unified School District, (2015) 237 Cal.App.4th 261

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

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

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

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

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

ATTORNEY GENERAL OPINIONS

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

Management Resources:

CALIFORNIA UNIFORM CONSTRUCTION COST ACCOUNTING COMMISSION PUBLICATIONS

Cost Accounting Policies and Procedures Manual

Frequently Asked Questions

WEB SITES

CSBA: <http://www.csba.org>

California Association of School Business Officials: <http://www.casbo.org>

California Department of Education: <http://www.cde.ca.gov>

California Department of General Services: <https://www.dgs.ca.gov>

California Uniform Construction Cost Accounting Commission: [http://www.sco.ca.gov/ard\\_cuccac.html](http://www.sco.ca.gov/ard_cuccac.html)

# CSBA Sample Administrative Regulation

**Business and Noninstructional Operations**

**AR 3311(a)**

**BIDS**

**Advertised/Competitive Bids**

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

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

**Public project means construction, reconstruction, erection, alteration, renovation, improvement, painting, repainting, demolition, and repair work involving a district owned, leased, or operated facility. (Public Contract Code 20111, 22002)**

**(cf. 3311.1 - Uniform Public Construction Cost Accounting Procedures)**

**(cf. 3311.2 - Lease-Leaseback Contracts)**

**(cf. 3311.3 - Design-Build Contracts)**

**2. The district shall also advertise for competitive bids when a A contract that exceeds the amount specified in law, as annually adjusted by the Superintendent of Public Instruction, for any of the following: (Public Contract Code 20111)**

**1.a.** The purchase of equipment, materials, or supplies to be furnished, sold, or leased to the district

**(cf. 3230 - Federal Grant Funds)**

**(cf. 3311.4 - Procurement of Technological Equipment)**

**2.b.** Services, not including construction services or special services and advice in accounting, financial, legal, or administrative matters

**3.c.** Repairs that are not a public project, including maintenance

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

Instructions and Procedures for Advertised Bids

**AR 3311(b)****BIDS (continued)**

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

(cf. 1113 - District and School Web Sites)

The notice shall contain the time, date, and location of any mandatory prebid conference, site visit, or meeting and details regarding when and where project documents, including the final plan and specifications, are available. Any such mandatory visit or meeting shall occur not less than five calendar days after the publication of the initial notice. (Public Contract Code 6610)

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

1. All bidders shall certify **in writing** the minimum, if not exact, percentage of post-consumer materials in products, materials, goods, or supplies offered or sold. (Public Contract Code 22152)

(cf. 3510 - Green School Operations)

2. All bids for construction work shall be presented under sealed cover. **The district may accept a bid that has been submitted electronically or on paper. (Public Contract Code 20111, 20112)**

**The bid and** shall be accompanied by **one of the following a forms** of bidder's security, **including either cash, a cashier's check payable to the district, a certified check made payable to the district, or a bidder's bond executed by an admitted surety insurer and made payable to the district.:** **The security of unsuccessful bidders shall be returned in a reasonable period of time, but in no event later than 60 days after the bid is awarded.** (Public Contract Code **20107, 20111, 20112**)

**a. Cash**

**b. A cashier's check made payable to the district**

**c. A certified check made payable to the district**

**d. A bidder's bond executed by an admitted surety insurer and made payable to the district**

**The security of unsuccessful bidders shall be returned in a reasonable period of time, but in no event later than 60 days after the bid is awarded. (Public Contract Code 20111)**

3. When a standardized proposal form is provided by the district, bids not presented on the standard form shall be disregarded. (Public Contract Code 20111.5)

4. Bids shall not be accepted after the advertised bid opening time, regardless of whether the bids are actually opened at that time. (Public Contract Code 20112)

**AR 3311(c)****BIDS (continued)**

5. When two or more identical lowest or highest bids are received, the Governing Board may determine by lot which bid shall be accepted. (Public Contract Code 20117)
6. If the district requires that the bid include prices for items that may be added to or deducted from the scope of work in the contract, the bid solicitation shall specify which one of the following methods will be used to determine the lowest bid. In the absence of such a specification, only the method provided in item #6a below shall be used. (Public Contract Code 20103.8)
- a. The lowest bid shall be the lowest total of the bid prices on the base contract without consideration of the prices on the additive or deductive items.
- b. The lowest bid shall be the lowest total of the bid prices on the base contract and those additive or deductive items that were specifically identified in the bid solicitation as being used for the purpose of determining the lowest bid price.
- c. The lowest bid shall be the lowest total of the bid prices on the base contract and those additive or deductive items that, when taken in order from a specifically identified list of those items in the solicitation, and added to or subtracted from the base contract, are less than or equal to a funding amount publicly disclosed by the district before the first bid is opened.

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

**7. In determining the lowest bid, the district shall consider only responsive bids that conform to bid specifications and are submitted by from responsible bidders who have demonstrated trustworthiness, quality, fitness, capacity, and experience to satisfactorily perform the public works contract. in determining the lowest bid.**

**a. When a bid is disqualified as determined to be nonresponsive based on district investigation or other information not obtained from the submitted bid, the Superintendent or designee shall notify the bidder and give him/her an opportunity to respond to the information determination.**

**b. When the lowest bidder is determined to be nonresponsible, the Superintendent or designee shall notify the bidder of his/her right to present evidence of his/her responsibility at a hearing before the Board.**

**8. Any subsequent change or alteration of a contract shall be governed by the provisions of Public Contract Code 20118.4.**

**9.** After being opened, all submitted bids become public records pursuant to Government Code 6252 and shall be made available for public review pursuant to law, Board policy, and administrative regulation.

(cf. 1340 - Access to District Records)

**(cf. 3580 - District Records)**

## AR 3311(d)

## BIDS (continued)

**10. When a bid is disqualified as nonresponsive based on district investigation or other information not obtained from the submitted bid, the Superintendent or designee shall notify the bidder and give him/her an opportunity to respond to the information.**

## Prequalification Procedure

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

When any public project involves an expenditure of \$1,000,000 or more and is funded or reimbursed wholly or partly by the School Facilities Program funds or other future state school bond, the district shall prequalify prospective bidders either quarterly or annually. The prequalification shall be valid for one year and the following requirements shall apply: (**Education Code 17406, 17407**; Public Contract Code 20111.6)

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

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

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

**AR 3311(e)****BIDS (continued)****Award of Contract**

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

1. When the contract is for the procurement and/or maintenance of electronic data processing systems and supporting software, in which case the Board may contract with any one of the three lowest responsible bidders (Public Contract Code 20118.1)
2. When the contract is for any transportation service which involves an expenditure of more than \$10,000 and which will be made with any person or corporation other than a common carrier, municipally owned transit system, or a parent/guardian of a students who are to be transported, in which case the Board may contract with other than the lowest bidder (Education Code 39802)
3. When the contract is one for which the Board has established goals and requirements relating to participation of disabled veteran or small business enterprises in accordance with Public Contract Code 2000-2002, in which case the Board may contract with the lowest responsible bidder who submits a responsive bid and complies or makes a good faith effort to comply with the goals and requirements (Public Contract Code 2000-2002)

**4. When procuring a lease-leaseback contract, in which case the Board shall award the contract based on objective criteria for determining the best combination of price and qualifications in accordance with Education Code 17400 and 17406**

**(cf. 3311.2 - Lease-Leaseback Contracts)**

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

**(cf. 3311.3 - Design-Build Contracts)**

**Protests by Bidders**

A bidder may protest a bid award if he/she believes that the award is not in compliance with law, Board policy, or the bid specification. ~~A protest must be filed in writing with the Superintendent or designee within five working days after receipt of notification of the contract award and shall include all documents supporting or justifying the protest.~~ The protest shall be filed in writing with the Superintendent or designee within three days after the District issues a notice of intent to award and shall include all documents supporting or justifying the protest. A bidder's failure to file the protest documents in a timely manner shall constitute a waiver of his/her right to protest the award of the contract.

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

**AR 3311(f)****BIDS (continued)**

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

**Alternative Bid Procedures for Technological Supplies and Equipment [SECTION MOVED TO NEW AR 3311.4]**

**Design-Build Contracts [SECTION MOVED TO NEW AR 3311.3]**

**Limitation on Use of Sole Sourcing**

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

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

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

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

However, the Superintendent or designee may designate a specific material, product, thing, or service by brand or trade name (sole sourcing) if the Board has made a finding, described in the invitation for bids or **request for proposal (RFP)**, that a particular material, product, thing, or service is designated for any of the following purposes: (Public Contract Code 3400)

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

**AR 3311(g)****BIDS (continued)****Bids Not Required**

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

(cf. 3300 - Expenditures and Purchases)

(cf. 3512 - Equipment)

Without advertising for bids, the Board may enter into an energy service contract and any related facility ground lease, when it determines that the terms of the contract and lease are in the best interest of the district **and meet the cost effectiveness requirements specified in Government Code 4217.12**. The Board's determination shall be made at a regularly scheduled public hearing of which notice is given to the public at least two weeks in advance and shall be based on cost **and savings** comparison findings specified in Government Code 4217.12. (Government Code 4217.12)

(cf. 3511 - Energy and Water Management)

(cf. 9320 - Meetings and Notices)

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

(cf. 6161.1 - Selection and Evaluation of Instructional Materials)

(cf. 6161.11 - Supplementary Instructional Materials)

(cf. 6163.1 - Library Media Centers)

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

(cf. 3551 - Food Service Operations/Cafeteria Fund)

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

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



**AR 3311(h)**

**BIDS (continued)**

(cf. 3517 - Facilities Inspection)

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

# CSBA Sample Board Policy

**Business and Noninstructional Operations**      BP 3311.1(a)

## **UNIFORM PUBLIC CONSTRUCTION COST ACCOUNTING PROCEDURES**

In awarding contracts for public works projects involving district facilities, the Governing Board desires to obtain the best value to the district and ensure the qualifications of contractors to complete the project in a satisfactory manner. The Board has, by resolution, adopted the procedures set forth in the Uniform Public Construction Cost Accounting Act pursuant to Public Contract Code 22030-22045, including the informal bidding procedures when allowed by law.

*(cf. 3311 - Bids)*

*(cf. 7110 - Facilities Master Plan)*

The Board delegates to the Superintendent or designee the responsibilities to award any contract eligible for informal bidding procedures and to develop plans, specifications, and working details for all public projects requiring formal bidding procedures.

No work, project, service, or purchase shall be split or separated into smaller work orders or projects for the purpose of evading legal requirements for competitive bidding. (Public Contract Code 22033)

Projects awarded through the UPCCAA shall be subject to the cost accounting procedures established by the California Uniform Construction Cost Accounting Commission. (Public Contract Code 22030)

### **Emergency Actions**

When formal bids are required by law but an emergency necessitates immediate repair or replacements, the Board may, upon a four-fifths vote of the Board, proceed to replace or repair a facility without adopting plans, specifications, strain sheets, or working details or giving notice for bids to let contracts. The work may be done by day labor under the direction of the Board and/or contractor. The emergency action shall subsequently be reviewed by the Board in accordance with Public Contract Code 22050 and shall be terminated at the earliest possible date that conditions warrant, so that the remainder of the emergency action may be completed by giving notice for bids to let contracts. (Public Contract Code 1102, 22035, 22050)

*(cf. 9323.2 - Actions by the Board)*

*Legal Reference: (see next page)*

BP 3311.1(b)

**UNIFORM PUBLIC CONSTRUCTION COST ACCOUNTING PROCEDURES (continued)**

*Legal Reference:*

PUBLIC CONTRACT CODE

1102 *Definition of emergency*

20110-20118.4 *Local Agency Public Construction Act; school districts*

22000-22020 *California Uniform Construction Cost Accounting Commission*

22030-22045 *Alternative procedures for public projects (UPCCAA), especially:*

22032 *Applicability of procedures based on amount of project*

22034 *Informal bidding procedure*

22035 *Emergency need for repairs or replacement*

22037-22038 *Formal bidding procedures for projects exceeding \$175,000*

22050 *Alternative emergency procedures*

*Management Resources:*

CALIFORNIA UNIFORM CONSTRUCTION COST ACCOUNTING COMMISSION PUBLICATIONS

*Cost Accounting Policies and Procedures Manual*

*Frequently Asked Questions*

WEB SITES

CSBA: <http://www.csba.org>

California Association of School Business Officials: <http://www.casbo.org>

California Uniform Construction Cost Accounting Commission: [http://www.sco.ca.gov/ard\\_cuccac.html](http://www.sco.ca.gov/ard_cuccac.html)

# CSBA Sample Administrative Regulation

**Business and Noninstructional Operations** AR 3311.1(a)

## **UNIFORM PUBLIC CONSTRUCTION COST ACCOUNTING PROCEDURES**

Procedures for awarding contracts for public works projects shall be determined on the basis of the amount of the project, as follows:

1. Public projects of \$45,000 or less may be performed by district employees by force account, negotiated contract, or purchase order. (Public Contract Code 22032)
2. Contracts for public projects of \$175,000 or less may be awarded through the following informal procedures: (Public Contract Code 22032, 22034, 22038)
  - a. The Superintendent or designee shall maintain a list of qualified contractors, identified according to categories of work.
  - b. The Superintendent or designee shall prepare a notice inviting informal bids which describes the project in general terms, explains how to obtain more information about the project, and states the time and place for submission of bids. The notice shall be disseminated by mail, fax, or email to all contractors on the district's list for the category of work being bid, unless the product or service is proprietary, at least 10 calendar days before bids are due. In addition, the Superintendent or designee may mail, fax, or email a notice inviting informal bids to all construction trade journals identified pursuant to Public Contract Code 22036.
  - c. The district shall review the informal bids and award the contract, except that:
    - (1) If all bids received through the informal process are in excess of \$175,000, the contract may be awarded to the lowest responsible bidder, provided that the Governing Board adopts a resolution with a four-fifths vote to award the contract at \$187,500 or less and the Board determines the district's cost estimate is reasonable.
    - (2) If no bids are received through the informal bid procedure, the project may be performed by district employees by force account or negotiated contract.
3. Public projects of more than \$175,000 shall, except as otherwise provided by law, be subject to formal bidding procedures, as follows: (Public Contract Code 22032, 22037, 22038)
  - a. Notice inviting formal bids shall state the time and place for receiving and opening sealed bids and distinctly describe the project. The notice shall be disseminated in both of the following ways:
    - (1) Through publication in a newspaper of general circulation in the district's jurisdiction or, if there is no such newspaper, then by posting the notice in at least three places designated by the district as places for posting its notices. Such notice shall be published at least 14 calendar days before the date that bids will be opened.

AR 3311.1(b)

**UNIFORM PUBLIC CONSTRUCTION COST ACCOUNTING PROCEDURES** (continued)

- (2) By mail and electronically, if available, by either fax or email, to all construction trade journals identified pursuant to Public Contract Code 22036. Such notice shall be sent at least 15 calendar days before the date that bids will be opened.

In addition to the notice required above, the district may give such other notice as it deems proper.

b. The district shall award the contract as follows:

- (1) The contract shall be awarded to the lowest responsible bidder. If two or more bids are the same and the lowest, the district may accept the one it chooses.
- (2) At its discretion, the district may reject all bids presented and declare that the project can be more economically performed by district employees, provided that the district notifies an apparent low bidder, in writing, of the district's intention to reject the bid. Such notice shall be mailed at least two business days prior to the hearing at which the district intends to reject the bid.
- (3) If no bids are received through the formal bid procedure, the project may be performed by district employees by force account or negotiated contract.

*(cf. 3311 - Bids)*

# CSBA Sample Administrative Regulation

**Business and Noninstructional Operations** AR 3311.2(a)

## LEASE-LEASEBACK CONTRACTS

The district may lease currently owned district property to any person, firm, or corporation for a minimum of \$1 per year, as long as the lease requires the person, firm, or corporation to construct a building or buildings on the property for the district's use during the lease and the property and building(s) will vest in the district at the expiration of the lease ("lease-leaseback"). (Education Code 17406)

*(cf. 3280 - Sale or Lease of District-Owned Real Property)*

*(cf. 3312 - Contracts)*

Any lease-leaseback contract shall be awarded through a competitive "best value" procurement process whereby a person, firm, or corporation is selected on the basis of objective criteria for evaluating the qualifications of proposers, with the resulting selection representing the best combination of price and qualifications. To make this determination, the district shall use the following procedures: (Education Code 17400, 17406)

1. Request for Sealed Proposals: The Superintendent or designee shall prepare a request for sealed proposals which shall include:
  - a. An estimate of the project's price
  - b. A clear, precise description of any preconstruction services that may be required and the facilities to be constructed
  - c. The key elements of the contract to be awarded
  - d. A description of the format that proposals shall follow and the elements they shall contain
  - e. The standards the district will use in evaluating proposals
  - f. The date on which proposals are due
  - g. The timetable the district will follow in reviewing and evaluating proposals
2. Notice: At least 10 days before the date for receipt of the proposals, the Superintendent or designee shall give notice of the request for sealed proposals using both of the following methods:
  - a. Providing notice at least once a week for two weeks in a local newspaper of general circulation pursuant to Public Contract Code 20112
  - b. Providing notice in a trade paper of general circulation published in the county where the project is located

AR 3311.2(b)

**LEASE-LEASEBACK CONTRACTS** (continued)

The Superintendent or designee also may post the notice on the district's web site or through an electronic portal.

3. Prequalification: A proposer shall be prequalified in accordance with Public Contract Code 20111.6(b)-(m) in order to submit a proposal. Any electrical, mechanical, and plumbing subcontractors shall be subject to the same prequalification requirements.

*(cf. 3311 - Bids)*

4. Evaluation Criteria: The request for sealed proposals shall identify all criteria that the district will consider in evaluating the proposals and qualifications of the proposers, including relevant experience, safety record, price proposal, and other factors specified by the district. The price proposal shall include, at the district's discretion, either a lump-sum price for the contract to be awarded or the proposer's proposed fee to perform the services requested, including the proposer's proposed fee to perform preconstruction services or any other work related to the facilities to be constructed, as requested by the district.

The request for sealed proposals shall specify whether each criterion will be evaluated on a pass-fail basis or will be scored as part of the "best value" score, and whether proposers must achieve any minimum qualification score for award of the contract. For each scored criterion, the district shall identify the methodology and rating or weighting system that will be used by the district in evaluating the criterion, including the weight assigned to the criterion and any minimum acceptable score.

5. Evaluation of Proposals: All proposals received shall be reviewed to determine whether they meet the format requirements and the standards specified in the request for sealed proposals. The district shall evaluate the qualifications of the proposers based solely upon the criteria and evaluation methodology set forth in the request for sealed proposals, and shall assign a best value score to each proposal. Once the evaluation is complete, all responsive proposals shall be ranked from the highest best value to the lowest best value to the district.
6. Award of Contract: The award of the contract shall be made by the Governing Board to the responsive proposer whose proposal is determined, in writing by the Board, to be the best value to the district.

If the selected proposer refuses or fails to execute the tendered contract, the Board may award the contract to the proposer with the second highest best value score, if deemed in the best interest of the district. If that proposer then refuses or fails to execute the tendered contract, the Board may award the contract to the proposer with the third highest best value score.

Upon issuance of a contract award, the district shall publicly announce its award, identifying the entity to which the award is made, along with a statement regarding the basis of the award. The statement regarding the contract award and the contract file shall provide sufficient information to satisfy an external audit.

7. Rejection of Proposals: At its discretion, the Board may reject all proposals and request new proposals.

Prior to entering into a lease-leaseback agreement, the Superintendent or designee shall have on file the contractor's enforceable commitment that the contractor and its subcontractors at every tier will use a skilled and trained workforce to perform all work on the project or contract that falls within an apprenticeable occupation in the building and construction trades. (Education Code 17407.5)

AR 3311.2(c)

**LEASE-LEASEBACK CONTRACTS (continued)**

Any lease-leaseback agreement shall be reviewed by the district's legal counsel to ensure that all required terms, including a lease term that provides for the district's occupancy of the building or improved property during the lease and an appropriate financing component, are included in the agreement.

*(cf. 9124 - Attorney)*

*Legal Reference:*

EDUCATION CODE

17400 Definitions

17406 Lease-leaseback contract

17407.5 Use of a skilled and trained workforce

PUBLIC CONTRACT CODE

20111.6 Prequalification procedures

20112 Notices

COURT DECISIONS

McGee v. Balfour Beatty Construction, LLC, et al. (4/12/16, No. B262850)

Davis v. Fresno Unified School District, (2015) 237 Cal.App.4th 261

*Management Resources:*

WEB SITES

CSBA: <http://www.csba.org>

California Association of School Business Officials: <http://www.casbo.org>



# CSBA Sample Administrative Regulation

**Business and Noninstructional Operations** AR 3311.3(a)

## DESIGN-BUILD CONTRACTS

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

*(cf. 3311 - Bids)*

*(cf. 3312 - Contracts)*

*(cf. 7110 - Facilities Master Plan)*

*(cf. 7140 - Architectural and Engineering Services)*

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

The procurement process for design-build projects shall be as follows: (Education Code 17250.25, 17250.35)

1. The district shall prepare a set of documents setting forth the scope and estimated price of the project. The documents may include, but are not limited to:
  - a. The size, type, and desired design character of the project
  - b. Performance specifications that cover the quality of materials, equipment, and workmanship
  - c. Preliminary plans or building layouts
  - d. Any other information deemed necessary to describe adequately the district's needs

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

2. The district shall prepare and issue a request for qualifications in order to prequalify, or develop a short list of, the design-build entities whose proposals shall be evaluated for final selection. The request for qualifications shall include, but is not limited to, all of the following elements:
  - a. Identification of the basic scope and needs of the project or contract, the expected cost range, the methodology that will be used by the district to evaluate proposals, the procedure for final selection of the design-build entity, and any other information deemed necessary by the district to inform interested parties of the contracting opportunity
  - b. Significant factors that the district reasonably expects to consider in evaluating qualifications, including technical design and construction expertise, acceptable safety record, and all other non-price-related factors

AR 3311.3(b)

**DESIGN-BUILD CONTRACTS (continued)**

- c. A standard template request for statements of qualifications prepared by the district, which shall contain all of the information required pursuant to Education Code 17250.25

The district also may identify specific types of subcontractors that must be included in the statement of qualifications and proposal.

A design-build entity shall not be prequalified or short-listed unless the entity provides an enforceable commitment to the district that the entity and its subcontractors at every tier will use a skilled and trained workforce, as defined in Education Code 17250.25, to perform all work on the project or contract that falls within an apprenticeable occupation in the building and construction trades. The entity may demonstrate such commitment through a project labor agreement, by becoming a party to the district's project labor agreement, or through an agreement with the district to provide evidence of compliance on a monthly basis during the performance of the project or contract.

3. The district shall prepare a request for proposals (RFP) that invites prequalified or short-listed entities to submit competitive sealed proposals in a manner prescribed by the district. The RFP shall include the information identified in items #2a and 2b above and the relative importance or weight assigned to each of the factors. If the district uses a best value selection method for a project, the district may reserve the right to request proposal revisions and hold discussions and negotiations with responsive proposers, in which case the district shall so specify in the request for proposals and shall publish separately or incorporate into the request for proposals applicable procedures to be observed by the district to ensure that any discussions or negotiations are conducted in good faith.
4. For those projects utilizing low bid as the final selection method, the bidding process shall result in lump-sum bids by the prequalified or short-listed design-build entities, and the contract shall be awarded to the lowest responsible bidder.
5. For those projects utilizing best value as a selection method, the following procedures shall be used:
  - a. Competitive proposals shall be evaluated using only the criteria and selection procedures specifically identified in the request for proposals. Criteria shall be weighted as deemed appropriate by the district and shall, at a minimum, include price, unless a stipulated sum is specified; technical design and construction experience; and life-cycle costs over 15 or more years.
  - b. Following any discussions or negotiations with responsive proposers and completion of the evaluation process, the responsive proposers shall be ranked on a determination of value provided, provided that no more than three proposers are required to be ranked.
  - c. The contract shall be awarded to the responsible entity whose proposal is determined by the district to have offered the best value to the public.
  - d. The district shall publicly announce the contract award, identifying the entity to which the award is made and the basis of the award. This statement and the contract file shall provide sufficient information to satisfy an external audit.

AR 3311.3(c)

**DESIGN-BUILD CONTRACTS (continued)**

*Legal Reference:*

EDUCATION CODE

17250.10-17250.55 *Design-build contracts*

*Management Resources:*

WEB SITES

CSBA: [http:// www.csba.org](http://www.csba.org)

California Association of School Business Officials: <http://www.casbo.org>

California Department of Education, Facilities: <http://www.cde.ca.gov/ls/fa>

# CSBA Sample Administrative Regulation

**Business and Noninstructional Operations** AR 3311.4(a)

## PROCUREMENT OF TECHNOLOGICAL EQUIPMENT

Rather than seek competitive bids, the district may use competitive negotiation when it makes a finding that a district procurement is for computers, software, telecommunications equipment, microwave equipment, or other related electronic equipment and apparatus. Competitive negotiation shall not be used to contract for any product that is available in substantial quantities to the general public. (Public Contract Code 20118.2)

*(cf. 0440 - District Technology Plan)*

*(cf. 3230 - Federal Grant Funds)*

*(cf. 3311 - Bids)*

*(cf. 3312 - Contracts)*

Whenever the competitive negotiation process is determined to be appropriate for such procurements, the district shall use the following procedures: (Public Contract Code 20118.2)

1. The Superintendent or designee shall prepare a request for proposals (RFP) that shall be submitted to an adequate number of qualified sources, as determined by the district, to permit reasonable competition consistent with the nature and requirement of the procurement.
2. Notice of the RFP shall be published at least twice in a newspaper of general circulation, at least 10 days before the date for receipt of the proposals.
3. The Superintendent or designee shall make every effort to generate the maximum feasible number of proposals from qualified sources, and shall make a finding to that effect before proceeding to negotiate if only a single response to the RFP is received.
4. The RFP shall identify all significant evaluation factors, including price, and their relative importance.
5. The Superintendent or designee shall provide reasonable procedures for the technical evaluation of the RFPs received, the identification of qualified sources, and the selection for the award of the contract.
6. The Governing Board shall award the contract to the qualified bidder whose proposal meets the evaluation standards and will be most advantageous to the district, considering price and all other factors.
7. If the Board does not award the contract to the bidder whose proposal contains the lowest price, then the Board shall make a finding setting forth the basis for the award to another bidder.
8. The Board, at its discretion, may reject all proposals.

Provisions in any contract concerning utilization of small business enterprises that are in accordance with the RFP shall not be subject to negotiation with the successful proposer. (Public Contract Code 20118.2)

*Legal Reference:*

PUBLIC CONTRACT CODE

May 9, ~~2018~~ <sup>2018</sup> Contracting by school districts; technological equipment

# CSBA Sample Board Policy

## Business and Noninstructional Operations AR 3314

### Payment for Construction Contracts

Payment on any contract for the creation, construction, alteration, repair, or improvement of any district property or facility or other public works project shall be made in accordance with the estimates, process, and/or schedule approved by the Governing Board.

As necessary, the Superintendent or designee may make progress payments as actual work is completed or materials are delivered. When a payment request is properly submitted by a contractor, any undisputed portion of the payment request shall be paid within 30 days. If the Superintendent or designee determines any payment request to be improper, he/she shall return the payment request to the contractor with a written statement of reasons why the request is not proper. (Public Contract Code [9203](#), [20104.50](#))

(cf. [3312](#) - Contracts)

The district may withhold up to five percent of the proceeds due to the contractor until completion and acceptance of the project. (Public Contract Code 7201)

The proceeds to be withheld by the district may exceed five percent when the Board has made a finding, prior to the bid and during a properly noticed and regularly scheduled **public** meeting, that the project is substantially complex and requires a higher retention amount than five percent. In such cases, the Board's finding **shall include a description of the specific project and why it is a unique project that is not regularly, customarily, or routinely performed by the district or licensed contractors. The bid documents shall include details explaining the basis for the finding** and the actual amount to be withheld ~~shall be included in the bid documents.~~ (Public Contract Code 7201)

(cf. [3311](#) - Bids)

(cf. [9320](#) - Meetings and Notices)

(cf. [9324](#) - Minutes and Recordings)

At any time after 50 percent of the work has been completed, the Board may release the withheld proceeds if it finds that satisfactory progress is being made. (Public Contract Code [9203](#))

Proceeds withheld by the district from payments to contractors for public works contracts shall be released within 60 days after the construction or improvement is completed. In the event of a dispute between the district and the contractor, the district may withhold from the final payment an amount not to exceed 150 percent of the disputed amount. (Public Contract Code [7107](#))

# CSBA Sample Administrative Regulation

## Business and Noninstructional Operations

AR 3440(a)

### INVENTORIES

In order to provide for the proper tracking and control of district property, the Superintendent or designee shall maintain an inventory of equipment in accordance with law for the following:

1. All equipment items currently valued in excess of \$500 (Education Code 35168)
2. All equipment items purchased with state and/or federal categorical funds that have a useful life of more than one year with an acquisition cost of \$500 or more per unit

*(cf. 3290 - Gifts, Grants and Bequests)*

*(cf. 3400 - Management of District Assets/Accounts)*

*(cf. 3512 - Equipment)*

In addition, the Superintendent or designee may maintain a list of specific items which shall be inventoried for internal control purposes regardless of their initial cost or current value.

The inventory shall contain a record of the following information: (Education Code 35168; 5 CCR 3946)

1. Name and description of the property
2. Identification number
3. Original cost of the item of equipment or a reasonable estimate if the original cost is unknown
4. Date of acquisition
5. Location of use
6. The date and method of disposal

*(cf. 3270 - Sale and Disposal of Books, Equipment and Supplies)*

In addition to the information specified in items #1-6 above, the following information shall be recorded for equipment acquired with state and/or federal categorical funds unless otherwise specified in law: (34 CFR 80.32; 5 CCR 3946; **2 CFR 200.313**)

1. Source of the property (funding source)
2. Titleholder
3. Percentage of federal participation in the cost of the property
4. Use and condition of property

AR 3440(b)

## **INVENTORIES (continued)**

5. Sale price of the property upon disposition and method used to determine current fair market value

***(cf. 3230 - Federal Grant Funds)***

At the time of purchase, the Superintendent or designee shall affix a label to the equipment containing the identification number and the district name. Equipment items purchased with categorical program funds shall also be labeled with the name of the project in accordance with 5 CCR 3946.

Whenever an equipment item is moved to a new location or the equipment is used for a new purpose, the new location or purpose shall be recorded in the inventory.

A copy of the inventory shall be kept at the district office and at the appropriate school site.

*(cf. 3580 - District Records)*

**The Superintendent or designee shall annually submit an inventory listing of federally owned property in its custody to the federal agency that granted the award. (2 CFR 200.312)**

### **Physical Inventory**

Note: The FPM process for both state and federal categorical programs includes a determination as to whether the district has conducted a physical inventory of equipment within the past two years in accordance with **34 CFR 80.32, 2 CFR 200.313** as provided below. The California School Accounting Manual recommends that districts conduct a physical inventory at least once a year. The district may revise the following paragraph to specify a timeline shorter than two years.

At least once every two years, a physical inventory of equipment shall be conducted and the results reconciled with the property records. (**34 CFR 80.32 2 CFR 200.313**)

The Superintendent or designee shall investigate any differences between the quantities determined by the physical inspection and those in the accounting records.

*Legal Reference: (see next page)*

AR 3440(c)

**INVENTORIES (continued)***Legal Reference:*EDUCATION CODE35168 *Inventory of equipment*CODE OF REGULATIONS, TITLE 53946 *Control, safeguards, disposal of equipment purchased with consolidated application funds*16022-16023 *Classification of records*16035 *Historical inventory of equipment*UNITED STATES CODE, TITLE 202301-2414 *Carl D. Perkins Career and Technical Education Act***CODE OF FEDERAL REGULATIONS, TITLE 2****200.0-200.521 *Federal uniform grant guidance*****CODE OF FEDERAL REGULATIONS, TITLE 34****80.1-80.52 *Uniform administrative requirements for grants to state and local governments****Management Resources:*CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS*California School Accounting Manual, 2008***OFFICE OF MANAGEMENT AND BUDGET COMMUNICATIONS***Circular A-87, Cost Principles for State, Local, and Indian Tribal Governments, rev. May 10, 2004*WEB SITES*California Association of School Business Officials: <http://www.casbo.org>**White House, Office of Management and Budget: <http://www.omb.gov> <https://www.whitehouse.gov/omb>**School Services of California, Inc.: <http://www.sscal.com>*



# CSBA Sample Administrative Regulation

## Business and Noninstructional Operations

AR 3460(a)

### FINANCIAL REPORTS AND ACCOUNTABILITY

#### Interim Reports

Each interim fiscal report developed pursuant to Education Code 42130 shall include an assessment of the district budget as revised to reflect current information regarding the adopted state budget, district property tax revenues, if any, and ending balances for the preceding fiscal year. (Education Code 42130, 42131)

The interim reports shall be based on State Board of Education (SBE) criteria and standards which address fund and cash balances, reserves, deficit spending, estimation of average daily attendance (ADA), projected enrollment, ratio of ADA to enrollment, projected local control funding formula (LCFF) revenue, salaries and benefits, other revenues and expenditures, and facilities maintenance. For purposes of assessing projections of LCFF revenue, the first interim report shall be compared to the adopted district budget, and the second interim report shall be compared to the projections in the first interim report. (Education Code 42130; 5 CCR 15453-15464)

*(cf. 3100 - Budget)*

*(cf. 3220.1 - Lottery Funds)*

*(cf. 3300 - Expenditures and Purchases)*

*(cf. 3314 - Payment for Goods and Services)*

The report shall also provide supplemental information regarding contingent liabilities, use of one-time revenues for ongoing expenditures, contingent revenues, contributions (i.e., projected contributions from unrestricted general fund resources to restricted general fund resources, projected transfers to or from the general fund to cover operating deficits in the general fund or any other fund, and capital project cost overruns that may impact the general fund budget), long-term commitments, unfunded liabilities, temporary interfund borrowings, the status of labor agreements, and the status of other funds. (Education Code 42130; 5 CCR 15453, 15464)

*(cf. 3110 - Transfer of Funds)*

#### Audit Report

The Superintendent or designee shall establish a timetable for the completion and review of the annual audit within the deadlines established by law.

The Superintendent or designee shall provide the necessary financial records and cooperate with the auditor selected by the Governing Board to ensure that the audit report contains all information required by law and the Governmental Accounting Standards Board (GASB).

The audit shall include an audit of income and expenditures by source of funds for all funds of the district, including the student body and cafeteria funds and accounts, **state and federal grant funds**, and any other funds under the control or jurisdiction of the district, as well as an audit of student attendance procedures. The audit shall also include a determination of whether LCFF funds were expended in accordance with the district's local control and accountability plan or an approved annual update of the plan. (Education Code 41020)

AR 3460(b)

FINANCIAL REPORTS AND ACCOUNTABILITY (continued)

(cf. 0460 - Local Control and Accountability Plan)

**(cf. 3230 - Federal Grant Funds)**

(cf. 3430 - Investing)

(cf. 3451 - Petty Cash Funds)

(cf. 3452 - Student Activity Funds)

(cf. 3551 - Food Service Operations/Cafeteria Fund)

If the district participates in the school district of choice program to accept interdistrict transfers, the Superintendent or designee shall notify the auditor, prior to the commencement of the audit, that the audit must include a review of the district's compliance with specified program requirements. (Education Code 48301)

(cf. 5117 - Interdistrict Attendance)

**When required by federal law, specified records pertaining to the audit of federal funds received and expended by the district shall be transmitted to the federal clearinghouse designated by the federal Office of Management and Budget and shall be made available for public inspection. Such records shall be transmitted within 30 days after receipt of the auditor's report or within nine months after the end of the fiscal year, whichever is sooner, unless a longer period is agreed to in advance by the federal agency or a different period is specified in a program-specific audit guide. (31 USC 7502)**

If an audit finding results in the district being required to repay an apportionment or pay a penalty, the district may appeal the finding to the Education Audit Appeals Panel by making an informal summary appeal within 30 days of receiving the final audit report or initiating a formal appeal within 60 days of receiving the report. (Education Code 41344, 41344.1)

While a public accounting firm is performing the audit of the district, it shall not provide any nonauditing, management, or other consulting services for the district except as provided in Government Auditing Standards, Amendment #3, published by the U.S. Government Accountability Office. (Education Code 41020)

Fund Balance

In accordance with GASB Statement 54, external financial reports shall report fund balances in the general fund within the following classifications based on the relative strength of constraints placed on the purposes for which resources can be used:

1. Nonspendable fund balance, including amounts that are not expected to be converted to cash, such as resources that are not in a spendable form or are legally or contractually required to be maintained intact
2. Restricted fund balance, including amounts constrained to specific purposes by their providers or by law
3. Committed fund balance, including amounts constrained to specific purposes by the Board
4. Assigned fund balance, including amounts which the Board or its designee intends to use for a specific purpose
5. Unassigned fund balance, including amounts that are available for any purpose

AR 3460(c)

## FINANCIAL REPORTS AND ACCOUNTABILITY (continued)

### Negative Balance Report

Whenever the district reports a negative unrestricted fund balance or a negative cash balance in its annual budget or annual audit report, it shall include in the budget a statement that identifies the reasons for the negative unrestricted fund balance or negative cash balance and the steps that have been taken to ensure that the negative balance will not occur at the end of the current fiscal year. (Education Code 42127.5)

### Non-Voter-Approved Debt Report

Pursuant to Education Code 42133, a district that has a qualified or negative certification in any fiscal year cannot issue non-voter-approved debt in that fiscal year or in the next fiscal year unless the County Superintendent determines that the district's repayment of the debt is probable.

Upon approval by the Board to proceed with the issuance of revenue bonds or any agreement for financing school construction pursuant to Education Code 17170-17199.5, the Superintendent or designee shall notify the County Superintendent of Schools and the county auditor. The Superintendent or designee shall provide the Board, the county auditor, the County Superintendent, and the public with related repayment schedules and evidence of the district's ability to repay the obligation. (Education Code 17150)

*(cf. 7214 - General Obligation Bonds)*

When the Board is considering the issuance of certificates of participation and other debt instruments that are secured by real property and do not require the approval of the voters of the district, the Superintendent or designee shall provide notice to the County Superintendent and county auditor no later than 30 days before the Board's approval to proceed with issuance. The Superintendent or designee shall provide the Board, the county auditor, the County Superintendent, and the public with information necessary to assess the anticipated effect of the debt issuance, including related repayment schedules, evidence of the district's ability to repay the obligation, and the issuance costs. (Education Code 17150.1)

### Other Postemployment Benefits Report **(GASB 45)**

The SBE's criteria and standards for budget adoption (5 CCR 15440-15451) require districts to estimate unfunded OPEBs as well as the unfunded portion of any self-insured benefits program. Changes to the unfunded liabilities are disclosed at interim reporting periods pursuant to 5 CCR 15453 and 15464. These reports are included in the state's standardized account code structure software used to develop budget and interim reports.

In accordance with GASB Statement **45 75**, the district's financial statements shall report the **annual** expense of nonpension other postemployment benefits (OPEBs) on an accrual basis over retirees' active working lifetime, as determined by a qualified actuary procured by the Superintendent or designee. To the extent that these OPEBs are not prefunded, the district shall report a liability on its financial statements.

*(cf. 4154/4254/4354 - Health and Welfare Benefits)*

*(cf. 9250 - Remuneration, Reimbursement and Other Benefits)*

AR 3460(d)

FINANCIAL REPORTS AND ACCOUNTABILITY (continued)

The Superintendent or designee shall annually present the estimated accrued but unfunded cost of OPEBs and the actuarial report upon which those costs are based at a public meeting of the Board. (Education Code 42140)

The district's financial obligation for OPEBs shall be reevaluated every two **or three** years in accordance with GASB **45 75. depending on the number of members in the OPEB plan.**

# CSBA Sample Board Policy

## Business and Noninstructional Operations

BP 3470(a)

### DEBT ISSUANCE AND MANAGEMENT

The Governing Board is committed to long-term capital and financial planning and recognizes that the issuance of debt is a key source for funding the improvement and maintenance of school facilities and managing cash flow. Any debt issued by the district shall be consistent with law and this policy.

*(cf. 3000 - Concepts and Roles)*

*(cf. 3460 - Financial Reports and Accountability)*

*(cf. 7110 - Facilities Master Plan)*

*(cf. 7210 - Facilities Financing)*

The district shall not enter into indebtedness or liability that in any year exceeds the income and revenue provided for such year, unless two-thirds of the voters approve the obligation or one of the exceptions specified in law applies. (California Constitution, Article 16, Section 18)

When the Board determines that it is in the best interest of the district, the Board may issue debt or order an election to issue debt. The Superintendent or designee shall make recommendations to the Board regarding appropriate financing methods for capital projects or other projects that are authorized purposes for debt issuance. When approved by the Board and/or the voters as applicable, the Superintendent or designee shall administer and coordinate the district's debt issuance program and activities, including the timing of issuance, sizing of issuance, method of sale, structuring of the issue, and marketing strategies.

The Superintendent or designee shall retain a financial advisor, municipal advisor, investment advisor, and other financial services professionals as needed to assist with the structuring of the debt issuance and to provide general advice on the district's debt management program, financing options, investments, and compliance with legal requirements. Contracts for services provided by such advisors may be for a single transaction or for multiple transactions, consistent with the contracting requirements in Education Code 17596. In the event that the district issues debt through a negotiated sale, underwriters may be selected for multiple transactions if multiple issuances are planned for the same project. In addition, the district shall select a legal team on an as-needed basis to assist with debt issuances or special projects.

*(cf. 3312 - Contracts)*

*(cf. 3600 - Consultants)*

*(cf. 9270 - Conflict of Interest)*

### Goals

The district's debt issuance activities and procedures shall be aligned with the district's vision and goals for providing adequate facilities and programs that support student learning and well-being. When issuing debt, the district shall ensure that it:

1. Maintains accountability for the fiscal health of the district, including prudent management and transparency of the district's financing programs

BP 3470(b)

**DEBT ISSUANCE AND MANAGEMENT (continued)**

2. Attains the best possible credit rating for each debt issue in order to reduce interest costs, within the context of preserving financial flexibility and meeting capital funding requirements
3. Takes all practical precautions and proactive measures to avoid any financial decision that will negatively impact current credit ratings on existing or future debt issues
4. Maintains effective communication with rating agencies and, as appropriate, credit enhancers such as bond insurers or other providers of credit or liquidity instruments in order to enhance the creditworthiness, liquidity, or marketability of the debt
5. Monitors the district's statutory debt limit in relation to assessed valuation within the district and the tax burden needed to meet long-term debt service requirements
6. When determining the timing of debt issuance, considers market conditions, cash flows associated with repayment, and the district's ability to expend the obtained funds in a timely, efficient, and economical manner consistent with federal tax laws
7. Determines the amortization (maturity) schedule which will fit best within the overall debt structure of the district at the time the new debt is issued
8. Considers the useful lives of assets funded by the debt issue, as well as repair and replacement costs of those assets to be incurred in the future
9. Preserves the availability of the district's general fund for operating purposes and other purposes that cannot be funded by the issuance of voter-approved debt
10. Meets the ongoing obligations and accountability requirements associated with the issuance and management of debt under state and federal tax and securities laws

*(cf. 0000 - Vision)*

*(cf. 0200 - Goals for the School District)*

*(cf. 7000 - Concepts and Roles)*

**Authorized Purposes for the Issuance of Debt**

The district may issue debt for any of the following purposes:

1. To pay for the cost of capital improvements, including acquiring, constructing, reconstructing, rehabilitating, replacing, improving, extending, enlarging, and/or equipping district facilities
2. To refund existing debt
3. To provide for cash flow needs

*(cf. 3100 - Budget)*

*(cf. 3110 - Transfer of Funds)*

BP 3470(c)

**DEBT ISSUANCE AND MANAGEMENT** (continued)

Pursuant to Government Code 53854, general operating costs, including, but not limited to, items normally funded in the district's annual operating budget, shall not be financed from debt payable later than 15 months from the date of issuance. The district may deem it desirable to finance cash flow requirements under certain conditions so that available resources better match expenditures within a given fiscal year. To satisfy both state constitutional and statutory constraints, such cash flow borrowing shall be payable from taxes, income, revenue, cash receipts, and other moneys attributable to the fiscal year in which the debt is issued.

**Authorized Types of Debt**

The Superintendent or designee shall recommend to the Board potential financing method(s) that result in the highest benefit to the district, with the cost of staff and consultants considered. Potential financing sources may include:

1. Short-Term Debt
  - a. Short-term debt, such as tax and revenue anticipation notes (TRANs), when necessary to allow the district to meet its cash flow requirements (Government Code 53850-53858)
  - b. Bond anticipation notes (BANs) to provide interim financing for capital bond projects that will ultimately be paid from general obligation bonds (Education Code 15150)
  - c. Grant anticipation notes (GANs) to provide interim financing pending the receipt of grants and/or loans from the state or federal government that have been appropriated and committed to the district (Government Code 53859-53859.08)
  
2. Long-Term Debt
  - a. General obligation bonds for projects approved by voters (California Constitution, Article 13A, Section 1; Education Code 15100-15262, 15264-15276; Government Code 53506-53509.5)
 

*(cf. 7214 - General Obligation Bonds)*
  - b. Special tax bonds issued pursuant to the Mello-Roos Community Facilities Act of 1982 (Government Code 53311-53368.3)
 

*(cf. 7212 - Mello Roos Districts)*
  
3. Lease financing, including certificates of participation (COPs)
  - a. Lease financing to fund the highest priority capital equipment purchases when pay-as-you-go financing is not feasible (Education Code 17450-17453.1)
  - b. Lease financing to fund facilities projects when there is insufficient time to obtain voter approval or in instances where obtaining voter approval is either not feasible or unavailable (Education Code 17400-17429)

**DEBT ISSUANCE AND MANAGEMENT (continued)**

4. Special financing programs or structures offered by the federal or state government, such as Qualified Zone Academy Bonds or other tax credit obligations or obligations that provide subsidized interest payments, when the use of such programs or structures is determined to result in sufficiently lower financing costs compared to traditional tax-exempt bonds and/or COPs
5. Temporary borrowing from other sources such as the County Treasurer

COPs, TRANS, revenue bonds, or any other non-voter approved debt instrument shall not be issued by the district in any fiscal year in which the district has a qualified or negative certification, unless the County Superintendent of Schools determines, pursuant to criteria established by the Superintendent of Public Instruction, that the district's repayment of that indebtedness is probable. (Education Code 42133)

**Relationship of Debt to District Facilities Program and Budget**

Decisions regarding the issuance of debt for the purpose of financing capital improvement shall be aligned with current needs for acquisition, development, and/or improvement of district property and facilities as identified in the district's facilities master plan or other applicable needs assessment, the projected costs of those needs, schedules for the projects, and the expected resources.

The cost of debt issued for major capital repairs or replacements shall be evaluated against the potential cost of delaying such repairs and/or replacing such facilities.

When considering a debt issuance, the Board and the Superintendent or designee shall evaluate both the short-term and long-term implications of the debt issuance and additional operating costs associated with the new projects involved. Such evaluation may include, but is not limited to, the projected ratio of annual debt service to the tax burden on the district's taxpayers and the ratio of annual debt service secured by the general fund to general fund expenditures.

The district may enter into credit enhancement agreements such as municipal bond insurance, surety bonds, letters of credit, and lines of credit with commercial banks, municipal bond insurance companies, or other financial entities when their use is judged to lower borrowing costs, eliminate restrictive covenants, or have a net economic benefit to the financing.

**Structure of Debt Issues**

The district shall consider the overall impact of the current and future debt burden of the financing when determining the duration of the debt issue.

The district shall design the financing schedule and repayment of debt so as to take best advantage of market conditions, ensure cost effectiveness, provide flexibility, and, as practical, recapture or maximize its debt capacity for future use. Principal amortization will be structured to meet debt repayment, tax rate, and flexibility goals.

For new money debt issuances for capital improvements, the district shall size the debt issuance with the aim of funding capital projects as deemed appropriate by the Board, as long as the issuance is consistent with the overall financing plan, does not exceed the amount authorized by voters, and, unless a waiver is sought and received from the state, will not cause the district to exceed the limitation on debt issuances specified in the California Constitution or Education Code 15106.



**DEBT ISSUANCE AND MANAGEMENT** (continued)

To the extent practicable, the district shall also consider credit issues, market factors, and tax law when sizing the district's bond issuance. The sizing of refunding bonds shall be determined by the amount of money that will be required to cover the principal of, any accrued interest on, and any redemption premium for the debt to be paid on the call date and to cover appropriate financing costs.

Any general obligation bond issued by the district shall mature within 40 years of the issuance date or as otherwise required by law. (California Constitution, Article 16, Section 18; Government Code 53508.6)

The final maturity of equipment or real property lease obligations will be limited to the useful life of the assets to be financed but, with respect to a lease purchase of equipment, no longer than a period of 10 years. (Education Code 17452)

**Method of Sale**

For the sale of any district-issued debt, the Superintendent or designee shall recommend the method of sale with the potential to achieve the lowest financing cost and/or to generate other benefits to the district. Potential methods of sale include:

1. A competitive bidding process through which the award is based on, among other factors, the lowest offered true interest cost
2. Negotiated sale, subject to approval by the district to ensure that interest costs are in accordance with comparable market interest rates
3. Private placement sale, when the financing can or must be structured for a single or limited number of purchasers or where the terms of the private placement are more beneficial to the district than either a negotiated or competitive sale

**Investment of Proceeds**

The district shall actively manage the proceeds of debt issued for public purposes in a manner that is consistent with state law governing the investment of public funds and with the permitted securities covenants of related financing documents executed by the district. Where applicable, the district's official investment policy and legal documents for a particular debt issuance shall govern specific methods of investment of bond-related proceeds. Preservation of principal shall be the primary goal of any investment strategy, followed by the availability of funds and then by return on investment.

*(cf. 3430 - Investing)*

With regard to general obligation bonds, the district shall invest new money bond proceeds in the county treasury pool as required by law. (Education Code 15146)

**DEBT ISSUANCE AND MANAGEMENT (continued)**

The management of public funds shall enable the district to respond to changes in markets or changes in payment or construction schedules so as to ensure liquidity and minimize risk.

**Refunding/Restructuring**

The district may consider refunding or restructuring outstanding debt if it will be financially advantageous or beneficial for debt repayment and/or structuring flexibility. When doing so, the district shall consider the maximization of the district's expected net savings over the life of the debt issuance and, when using a general obligation bond to refund an existing bond, shall ensure that the final maturity of the refunding bond is no longer than the final maturity of the existing bond.

**Internal Controls**

The Superintendent or designee shall establish internal control procedures to ensure that the proceeds of any debt issuance are directed to the intended use. Such procedures shall assist the district in maintaining the effectiveness and efficiency of operations, properly expending funds, reliably reporting debt incurred by the district and the use of the proceeds, complying with all laws and regulations, preventing fraud, and avoiding conflict of interest.

*(cf. 3314 - Payments for Goods and Services)*

*(cf. 3400 - Management of District Assets/Accounts)*

The district shall be vigilant in using bond proceeds in accordance with the stated purposes at the time such debt was incurred as defined in the text of the voter-approved bond measure. (Government Code 53410)

When feasible, the district shall issue debt with a defined revenue source in order to preserve the use of the general fund for general operating purposes.

The district shall annually conduct a due diligence review to ensure its compliance with all ongoing obligations applicable to issuers of debt. Such a review may be conducted by general legal counsel or bond counsel. Any district personnel involved in conducting such reviews shall receive periodic training regarding their responsibilities.

In addition, the Superintendent or designee shall ensure that the district completes, as applicable, all performance and financial audits that may be required for any debt issued by the district, including disclosure requirements applicable to a particular transaction.

**Records/Reports**

At least 30 days prior to the sale of any debt issue, the Superintendent or designee shall submit a report of the proposed issuance to the California Debt and Investment Advisory Commission (CDIAC). Such report shall include a self-certification that the district has adopted a policy concerning the use of debt that complies with law and that the contemplated debt issuance is consistent with that policy. (Government Code 8855)

On or before January 31 of each year, the Superintendent or designee shall submit a report to the CDIAC regarding the debt authorized, the debt outstanding, and the use of proceeds of the issued debt for the period from July 1 to June 30. (Government Code 8855)

BP 3470(g)

The Superintendent or designee shall provide initial and any annual or ongoing disclosures required by 17 CFR 240.10b-5 and 240.15c2-12 to the Municipal Securities Rulemaking Board, investors, and other persons or entities entitled to disclosure, and shall ensure that the district's disclosure filings are updated as needed.

The Superintendent or designee shall maintain transaction records of decisions made in connection with each debt issuance, including the selection of members of the financing team, the structuring of the financing, selection of credit enhancement products and providers, and selection of investment products. Each transaction file shall include the official transcript for the financing, interest rates and cost of issuance on the day when the debt was sold ("final number runs"), and a post-pricing summary of the debt issue. In addition, documentation evidencing the expenditure of proceeds, the use of debt-financed property by public and private entities, all sources of payment or security for the debt, and investment of proceeds shall be kept for as long as the debt is outstanding, plus the period ending three years after the financial payment date of the debt or the final payment date of any obligations or series of bonds issued to refund directly or indirectly all of any portion of the debt, whichever is later.

The Superintendent or designee shall annually report to the Board regarding debts issued by the district, including information on actual and projected tax rates, an analysis of bonding capacity, ratings on the district's bonds, market update and refunding opportunities, new development for California bond financings, and the district's compliance with post-issuance requirements.

*Legal Reference:*

EDUCATION CODE

5300-5441 *Conduct of elections*  
 15100-15262 *Bonds for school districts and community college districts*  
 15264-15276 *Strict accountability in local school construction bonds*  
 15278-15288 *Citizen's oversight committees*  
 15300-15425 *School Facilities Improvement Districts*  
 17150 *Public disclosure of non-voter-approved debt*  
 17400-17429 *Leasing of district property*  
 17450-17453.1 *Leasing of equipment*  
 17456 *Sale or lease of district property*  
 17596 *Duration of contracts*  
 42130-42134 *Financial reports and certifications*

ELECTIONS CODE

1000 *Established election dates*

GOVERNMENT CODE

8855 *California Debt and Investment Advisory Commission*  
 53311-53368.3 *Mello-Roos Community Facilities Act*  
 53410-53411 *Bond reporting*  
 53506-53509.5 *General obligation bonds*  
 53550-53569 *Refunding bonds of local agencies*  
 53580-53595.55 *Bonds*  
 53850-53858 *Tax and revenue anticipation notes*  
 53859-53859.08 *Grant anticipation notes*

CALIFORNIA CONSTITUTION

Article 13A, Section 1 *Tax limitation*  
 Article 16, Section 18 *Debt limit*

UNITED STATES CODE, TITLE 15

78o-4 *Registration of municipal securities dealers*

UNITED STATES CODE, TITLE 26

54E *Qualified Zone Academy Bonds*

BP 3470(h)

**DEBT ISSUANCE AND MANAGEMENT (continued)**

May 9, 2018

CODE OF FEDERAL REGULATIONS, TITLE 17

240.10b-5 Prohibition against fraud or deceit  
240.15c2-12 Municipal securities disclosure  
CODE OF FEDERAL REGULATIONS, TITLE 26  
1.103 Interest on state and local bonds  
1.141 Private activity bonds  
1.148 Arbitrage and rebate  
1.149 Hedge bonds  
1.6001-1 Records

*Management Resources:*

CALIFORNIA DEBT AND INVESTMENT ADVISORY COMMISSION PUBLICATIONS

California Debt Issuance Primer

GOVERNMENT FINANCE OFFICERS ASSOCIATION PUBLICATIONS

An Elected Official's Guide to Debt Issuance, 2nd Ed., 2016

Understanding Your Continuing Disclosure Responsibilities, Best Practice, September 2015

Investment of Bond Proceeds, Best Practice, September 2014

Selecting and Managing Municipal Advisors, Best Practice, February 2014

Debt Management Policy, Best Practice, October 2012

Analyzing and Issuing Refunding Bonds, Best Practice, February 2011

INTERNAL REVENUE SERVICE PUBLICATIONS

Tax Exempt Bond FAQs Regarding Record Retention Requirements

Tax-Exempt Governmental Bonds, Publication 4079, rev. 2016

U.S. GOVERNMENT ACCOUNTABILITY OFFICE PUBLICATIONS

Internal Control System Checklist

WEB SITES

California Debt and Investment Advisory Commission: <http://www.treasurer.ca.gov/cdiac>

Government Finance Officers Association: <http://www.gfoa.org>

Internal Revenue Service: <https://www.irs.gov>

Municipal Security Rulemaking Board, Electronic Municipal Market Access (EMMA): <http://www.emma.msrb.org>

U.S. Government Accountability Office: <http://www.gao.gov>

U.S. Securities and Exchange Commission: <https://www.sec.gov>

# CSBA Sample Administrative Regulation

## Business and Noninstructional Operations

AR 3512(a)

### EQUIPMENT

District equipment shall be used primarily for educational purposes and/or to conduct district business. The Superintendent or designee shall ensure that all employees, students, and other users understand the appropriate use of district equipment and that any misuse may be cause for disciplinary action or loss of user privilege.

*(cf. 0440 - District Technology Plan)*  
*(cf. 3515.4 - Recovery for Property Loss or Damage)*  
*(cf. 3540 - Transportation)*  
*(cf. 3551 - Food Service Operations/Cafeteria Fund)*  
*(cf. 4040 - Employee Use of Technology)*  
*(cf. 4118 - Dismissal/Suspension/Disciplinary Action)*  
*(cf. 4218 - Dismissal/Suspension/Disciplinary Action)*  
*(cf. 5142 - Safety)*  
*(cf. 5144 - Discipline)*  
*(cf. 6000 - Concepts and Roles)*  
*(cf. 6163.4 - Student Use of Technology)*  
*(cf. 6171 - Title I Programs)*

School-connected organizations may be granted reasonable use of the equipment for school-related matters as long as it does not interfere with the use by students or employees or otherwise disrupt district operations.

*(cf. 1230 - School-Connected Organizations)*  
*(cf. 1330 - Use of School Facilities)*

The **Principal shall approve the removal of district owned equipment. Superintendent or designee** shall approve the transfer of any district equipment from one work site to another and the removal of any district equipment for off-site use. **When any equipment is taken off site, the borrower is responsible for its safe return and shall be fully liable for any loss or damage.**

Employees transferred to another work site shall take with them only those personal items that have been purchased with their own funds unless otherwise authorized by the Superintendent or designee or applicable Board policy.

**The Superintendent or designee shall maintain an inventory of all equipment currently valued in excess of \$500. (Education Code 35168; 5 CCR 3946)**

*(cf. 3440 - Inventories)*

When equipment is unusable or is no longer needed, it may be sold, donated, or disposed of in accordance with Education Code 17540-17555 or **34 CFR 80.32 2 CFR 200.313**, as applicable.

*(cf. 3270 - Sale and Disposal of Books, Equipment and Supplies)*

AR 3512(b)

EQUIPMENT (continued)

Equipment Acquired with Federal Funds

The Superintendent or designee shall obtain prior written approval from the California Department of Education or other awarding agency before purchasing equipment with federal funds. **(2 CFR 200.48, 200.313, 200.439)**

**(cf. 3230 - Federal Grant Funds)**

*(cf. 3300 - Expenditures and Purchases)*

All equipment purchased for federal programs funded through the consolidated application pursuant to Education Code 64000-64001 shall be labeled with the name of the project, identification number, and name of the district. **(2 CFR 200.313; 5 CCR 3946)**

For any equipment acquired in whole or in part with federal funds, the Superintendent or designee shall develop adequate maintenance procedures to keep the property in good condition. He/she shall also develop adequate safeguards to prevent loss, damage, or theft of the property and shall investigate any loss, damage, or theft. **(2 CFR 200.313; 34 CFR 80.32)**

*(cf. 3530 - Risk Management/Insurance)*

*(cf. 4156.3/4256.3/4356.3 - Employee Property Reimbursement)*

Equipment purchased for use in a federal program shall be used in that program as long as needed, whether or not the program continues to be supported by federal funds. The equipment may be used in other activities currently or previously supported by a federal agency when such use does not interfere with the work on the project or program for which it was originally acquired or when use of the equipment is no longer needed for the original program. **(34 CFR 80.32 2 CFR 200.313)**

*Legal Reference:*

EDUCATION CODE

17540-17542 *Sale or lease of personal property by one district to another*

17545-17555 *Sale of personal property*

17605 *Delegation of authority to purchase supplies and equipment*

35160 *Authority of governing boards*

35168 *Inventory of equipment*

64000-64001 *Consolidated application process*

CODE OF REGULATIONS, TITLE 5

3946 *Control, safeguards, disposal of equipment purchased with state and federal consolidated application funds*

4424 *Comparability of services*

16023 *Class 1 - Permanent records*

UNITED STATES CODE, TITLE 20

6321 *Fiscal requirements*

**CODE OF FEDERAL REGULATIONS, TITLE 2**

**200.0-200.521 Federal uniform grant guidance**

**CODE OF FEDERAL REGULATIONS, TITLE 34**

**80.1-80.52 Uniform administration requirements for grants to state and local governments**

*Management Resources:*

CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS

*California School Accounting Manual*

**OFFICE OF MANAGEMENT AND BUDGET PUBLICATIONS**

**Cost Principles for State, Local, and Indian Tribal Governments, OMB Circular A-87**

WEB SITES

California Department of Education: <http://www.cde.ca.gov>

Office of Management and Budget: <https://www.whitehouse.gov/omb>

# CSBA Sample Board Policy

## Business and Noninstructional Operations

BP 3513.3(a)

### TOBACCO-FREE SCHOOLS

The Governing Board recognizes that smoking and other uses of tobacco and nicotine products constitute a serious public health hazard and are inconsistent with district goals to provide a healthy environment for students and staff.

*(cf. 3514 - Environmental Safety)*  
*(cf. 4159/4259/4359 - Employee Assistance Programs)*  
*(cf. 5030 - Student Wellness)*  
*(cf. 5131.62 - Tobacco)*  
*(cf. 5141.23 - Asthma Management)*  
*(cf. 6142.8 - Comprehensive Health Education)*  
*(cf. 6143 - Courses of Study)*

The Board prohibits **smoking and/or** the use of tobacco products at any time in district-owned or leased buildings, on district property, and in district vehicles. (Health and Safety Code 104420, **104559; Labor Code 6404.5; 20 USC 6083**)

**This** **These** prohibitions **applies apply** to all employees, students, and visitors at any school-sponsored instructional program, activity, or athletic event held on or off district property. Any written joint use agreement governing community use of district facilities or grounds shall include notice of the district's tobacco-free schools policy and consequences for violations of the policy.

*(cf. 1330 - Use of School Facilities)*  
*(cf. 1330.1 - Joint Use Agreements)*

**The products prohibited include any product containing tobacco or nicotine, including, but not limited to, cigarettes, cigars, miniature cigars, smokeless tobacco, snuff, chew, clove cigarettes, betel, electronic cigarettes, electronic hookahs, and other vapor-emitting devices, with or without nicotine content, that mimic the use of tobacco products.**

**Smoking** means inhaling, exhaling, burning, or carrying of any lighted or heated cigar, cigarette, pipe, tobacco, or plant product intended for inhalation, whether natural or synthetic, in any manner or form, and includes the use of an electronic smoking device that creates aerosol or vapor or of any oral smoking device for the purpose of circumventing the prohibition of smoking. (Business and Professions Code 22950.5; Education Code 48901)

**Tobacco products** include: (Business and Professions Code 22950.5; Education Code 48901)

1. Any product containing, made, or derived from tobacco or nicotine that is intended for human consumption, whether smoked, heated, chewed, absorbed, dissolved, inhaled, snorted, sniffed, or ingested by any other means, including, but not limited to, cigarettes, cigars, little cigars, chewing tobacco, pipe tobacco, or snuff

2. An electronic device that delivers nicotine or other vaporized liquids to the person inhaling from the device, including, but not limited to, an electronic cigarette, cigar, pipe, or hookah

**BP 3513.3(b)****TOBACCO-FREE SCHOOLS (continued)****3. Any component, part, or accessory of a tobacco product, whether or not sold separately**

This policy does not prohibit the use or possession of prescription products and other cessation aids that have been approved by the U.S. Department of Health and Human Services, Food and Drug Administration, such as nicotine patch or gum.

Smoking or use of any tobacco-related product or disposal of any tobacco-related waste is prohibited within 25 feet of any playground, except on a public sidewalk located within 25 feet of the playground. In addition, any form of intimidation, threat, or retaliation against a person for attempting to enforce this policy is prohibited. (Health and Safety Code 104495)

*Legal Reference:*EDUCATION CODE

48900 Grounds for suspension/expulsion

48901 Prohibition against tobacco use by students

BUSINESS AND PROFESSIONS CODE**22950.5 Stop Tobacco Access to Kids Enforcement Act; definitions**HEALTH AND SAFETY CODE

39002 Control of air pollution from nonvehicular sources

104350-104495 Tobacco use prevention, especially:

104495 Prohibition of smoking and tobacco waste on playgrounds

**104559 Tobacco use prohibition**

119405 Unlawful to sell or furnish electronic cigarettes to minors

LABOR CODE

3300 Employer, definition

6304 Safe and healthful workplace

6404.5 Occupational safety and health; use of tobacco products

UNITED STATES CODE, TITLE 20

6083 Nonsmoking policy for children's services

**7100-7117 Safe and Drug Free Schools and Communities Act****7111-7122 Student Support and Academic Enrichment Grants**CODE OF FEDERAL REGULATIONS, TITLE 21

1140.1-1140.34 Unlawful sale of cigarettes and smokeless tobacco to minors

**PERB PUBLIC EMPLOYMENT AND RELATIONS BOARD RULINGS**Eureka Teachers Assn. v. Eureka City School District (1992) PERB Order #955 (16 PERC 23168)CSEA #506 and Associated Teachers of Metropolitan Riverside v. Riverside Unified School District (1989) PERB Order #750 (13 PERC 20147)*Management Resources:*WEB SITESCalifornia Department of Education, Alcohol, Tobacco and Other Drug Prevention: <http://www.cde.ca.gov/ls/he/at>California Department of Education, Tobacco-Free School District Certification: <http://www.cde.ca.gov/ls/he/at/tobaccofreecert.asp>California Department of Public Health, Tobacco Control: <http://www.cdph.ca.gov/programs/tobacco>Occupational Safety and Health Standards Board: <http://www.dir.ca.gov/OSHSB/oshsb.html>U.S. Environmental Protection Agency: <http://www.epa.gov>



# CSBA Sample Administrative Regulation

## Business and Noninstructional Operations

AR 3513.3(a)

### TOBACCO-FREE SCHOOLS

#### Notifications

Information about the district's tobacco-free schools policy and enforcement procedures shall be communicated clearly to employees, parents/guardians, students, and the community. (Health and Safety Code 104420)

*(cf. 4112.9/4212.9/4312.9 - Employee Notifications)*

*(cf. 5145.6 - Parental Notifications)*

The Superintendent or designee may disseminate this information through annual written notifications, district and school web sites, student and parent handbooks, and/or other appropriate methods of communication.

*(cf. 1113 - District and School Web Sites)*

**The Superintendent or designee shall ensure that** signs stating "Tobacco use is prohibited" **shall be are** prominently displayed at all entrances to school property. (Health and Safety Code 104420, **104559**)

#### Enforcement/Discipline

Any employee or student who violates the district's tobacco-free schools policy shall be asked to refrain from smoking and shall be subject to disciplinary action as appropriate.

*(cf. 4118 - Suspension/Disciplinary Action)*

*(cf. 4218 - Dismissal/Suspension/Disciplinary Action)*

*(cf. 5144 - Discipline)*

*(cf. 5144.1 - Suspension and Expulsion/Due Process)*

Any other person who violates the district's policy on tobacco-free schools shall be informed of the district's policy and asked to refrain from smoking. If the person fails to comply with this request, the Superintendent or designee may:

1. Direct the person to leave school property
2. Request local law enforcement assistance in removing the person from school premises
3. If the person repeatedly violates the tobacco-free schools policy, prohibit him/her from entering district property for a specified period of time

*(cf. 1250 - Visitors/Outsiders)*

*(cf. 3515.2 - Disruptions)*

The Superintendent or designee shall not be required to physically eject a nonemployee who is smoking or to request that the nonemployee refrain from smoking under circumstances involving a risk of physical harm to the district or any employee. (Labor Code 6404.5)

# CSBA Sample Board Policy

**Business and Noninstructional Operations**      BP 3513.4(a)

## **DRUG AND ALCOHOL FREE SCHOOLS**

The Governing Board recognizes the need to keep district schools free of drugs and alcohol in order to create a safe and healthy environment conducive to learning and promote student health and well-being. The Board prohibits the possession, use, or sale of drugs and alcohol at any time in district-owned or leased buildings, on district property, and in district vehicles, unless otherwise permitted by law.

*(cf. 1325 - Advertising and Promotion)*  
*(cf. 3513.3 - Tobacco-Free Schools)*  
*(cf. 4020 - Drug and Alcohol-Free Workplace)*  
*(cf. 4159/4259/4359 - Employee Assistance Programs)*  
*(cf. 5030 - Student Wellness)*  
*(cf. 5131.6 - Alcohol and Other Drugs)*  
*(cf. 5131.62 - Tobacco)*  
*(cf. 6142.8 - Comprehensive Health Education)*

The following substances are prohibited on all district property:

1. Any substance which may not lawfully be possessed, used, or sold in California
2. Cannabis or cannabis products (Health and Safety Code 11362.3; 21 USC 812, 844)
3. Alcoholic beverages, unless approved by the Superintendent or designee for limited purposes specified in Business and Professions Code 25608

*(cf. 1330 - Use of School Facilities)*  
*(cf. 1330.1 - Joint Use Agreements)*

Prescription medication, except for prescribed cannabis, may be administered at school in accordance with law, district policy and regulations, and written statements by the parent/guardian and the student's authorized health care provider as applicable.

*(cf. 5141.21 - Administering Medications and Monitoring Health Conditions)*

Information about the district's drug- and alcohol-free schools policy and the consequences for violations shall be communicated clearly to employees, parents/guardians, students, and the community.

### **Enforcement/Discipline**

The Superintendent or designee shall take appropriate action to eliminate the possession, use, or sale of alcohol and other drugs and related paraphernalia in district facilities, on district property, in district vehicles, or at school-sponsored activities. As appropriate, he/she may direct anyone violating this policy to leave school property and/or refer the matter to law enforcement.

BP 3513.4(b)

**DRUG AND ALCOHOL FREE SCHOOLS (continued)**

*(cf. 1250 - Visitors/Outsiders)*

*(cf. 3515.2 - Disruptions)*

*(cf. 5145.11 - Questioning and Apprehension by Law Enforcement)*

*(cf. 5145.12 - Search and Seizure)*

Students and employees who violate the terms of this policy may be subject to discipline and/or referred to assistance programs in accordance with law and Board policy.

*(cf. 4112.41/4212.41/4312.41 - Employee Drug Testing)*

*(cf. 4112.42/4212.42/4312.42 - Drug and Alcohol Testing for School Bus Drivers)*

*(cf. 4117.7/4217.7/4317.7 - Employment Status Reports)*

*(cf. 4118 - Dismissal/Suspension/Disciplinary Action)*

*(cf. 4218 - Dismissal/Suspension/Disciplinary Action)*

*(cf. 5131 - Conduct)*

*(cf. 5144 - Discipline)*

*(cf. 5144.1 - Suspension and Expulsion/Due Process)*

*(cf. 5144.2 - Suspension and Expulsion/Due Process (Students with Disabilities))*

*(cf. 6145 - Extracurricular and Cocurricular Activities)*

*(cf. 6145.2 - Athletic Competition)*

*Legal Reference: (see next page)*

BP 3513.4(c)

**DRUG AND ALCOHOL FREE SCHOOLS (continued)***Legal Reference:*EDUCATION CODE

44940 *Compulsory leave of absence for certificated persons*  
 44940.5 *Procedures when employees are placed on compulsory leave of absence*  
 45123 *Employment after conviction of controlled substance offense*  
 45304 *Compulsory leave of absence for classified persons*  
 48900 *Suspension or expulsion (grounds)*  
 48900.5 *Suspension, limitation on imposition; exception*  
 48901 *Smoking or use of tobacco prohibited*  
 48901.5 *Prohibition of electronic signaling devices*  
 48902 *Notification of law enforcement authorities; civil or criminal immunity*  
 48909 *Narcotics or other hallucinogenic drugs*  
 48915 *Expulsion; particular circumstances*

BUSINESS AND PROFESSIONS CODE

25608 *Alcohol on school property; use in connection with instruction*

GOVERNMENT CODE

8350-8357 *Drug-free workplace*

HEALTH AND SAFETY CODE

11053-11058 *Standards and schedules*  
 11353.6 *Juvenile Drug Trafficking and Schoolyard Act*  
 11362.1 *Possession and use of cannabis, persons age 21 and over*  
 11362.3 *Limitations on possession and use of cannabis*  
 11362.79 *Limitations on medical use of cannabis*  
 104559 *Tobacco use prohibition*

PENAL CODE

13860-13864 *Suppression of drug abuse in schools*

VEHICLE CODE

13202.5 *Drug and alcohol related offenses by person under age of 21, but aged 13 or over;*

UNITED STATES CODE, TITLE 20

7101-7122 *Student Support and Academic Enrichment Grants*

UNITED STATES CODE, TITLE 21

812 *Schedules of controlled substances*  
 844 *Penalties for possession of controlled substance*

UNITED STATES CODE, TITLE 41

8101-8106 *Drug-Free Workplace Act*

COURT DECISIONS

*Ross v. RagingWire Telecommunications, Inc.*, 42 Cal. 4th 920 (2008)

# CSBA Sample Board Policy

## Business and Noninstructional Operations

BP 3515.2(a)

### DISRUPTIONS

The Governing Board is committed to providing a safe **and orderly** environment for **district** students, staff, and others **while they are** on district property or **while** engaged in school activities.

The Superintendent or designee shall remove any individual who, by his/her presence or action, disrupts or threatens to disrupt normal **district or school** operations **at a school campus or any other district facility**, threatens the health or safety of anyone on district property, or causes or threatens to cause damage to district property or to any property on school grounds.

*(cf. 1250 - Visitors/Outsiders)*

*(cf. 3515 - Campus Security)*

*(cf. 4118 - **Dismissal**/Suspension/Disciplinary Action)*

*(cf. 4158/4258/4358 - Employee Security)*

*(cf. 4218 - Dismissal/Suspension/Disciplinary Action)*

*(cf. 5131.4 - Student Disturbances)*

The Superintendent or designee shall establish a plan describing staff responsibilities and actions to be taken when an individual is causing **or threatening to cause** a disruption. **The plan shall address, as appropriate, visitor registration procedures; campus security measures; evacuation procedures; lock-down procedures; possible responses to an active shooter situation; communications within the school and with parents/guardians, law enforcement, and the media in the event of an emergency; and crisis counseling or other assistance for students and staff after a disruption.** In developing such a plan, the Superintendent or designee shall consult with law enforcement to create guidelines for law enforcement support and intervention **in the event of a disruption when necessary.**

*(cf. 0450 - **Comprehensive Safety Plan**)*

*(cf. 3515.3 - District Police/Security Department)*

*(cf. 3515.7 - Firearms on School Grounds)*

*(cf. 3516 - Emergencies and Disaster Preparedness Plan)*

The Superintendent or designee shall provide training to school staff on how to identify and respond to actions or situations that may constitute a disruption.

*(cf. 4131 - Staff Development)*

*(cf. 4231 - Staff Development)*

*(cf. 4331 - Staff Development)*

Any employee who believes that a disruption may occur shall immediately contact the principal. The principal or designee shall notify law enforcement in accordance with Education Code 48902 and 20 USC 7151 and in other situations, as appropriate.

BP 3515.2(b)

**DISRUPTIONS (continued)****Safe School Zone**

**Possession of a firearm within 1000 feet of any district school is prohibited except when authorized by law. (Penal Code 626.9)**

**Possession of any other unauthorized weapon or dangerous instrument is prohibited on school grounds or buses and at school-related or school-sponsored activities without the written permission of school authorities.**

*(cf. 5131.7 - Weapons and Dangerous Instruments)*

*(cf. 5144.1 - Suspension and Expulsion/Due Process)*

*(cf. 5144.2 - Suspension and Expulsion/Due Process (Students with Disabilities))*

*Legal Reference:*EDUCATION CODE

32210 Willful disturbance of public school or meeting, misdemeanor

32211 Threatened disruption or interference with classes; misdemeanor

35160 Authority of governing boards

44810 Willful interference with classroom conduct

44811 Disruption of classwork or extracurricular activities

48902 Notification of law enforcement authorities

51512 Prohibited use of electronic listening or recording device

PENAL CODE

243.5 Assault or battery on school property

415.5 Disturbance of peace of school

626-626.11 Schools, crimes, especially:

626.7 Failure to leave campus or facility; wrongful return; penalties; notice; exceptions

626.8 Disruptive presence at schools

626.81 Misdemeanor for registered sex offender to come onto school grounds

626.85 Misdemeanor for specified drug offender presence on school grounds

626.9 Gun Free School Zone Act

627-627.10 Access to school premises

653b Loitering about schools or public places

12556 Imitation firearms

**30310 Prohibition against ammunition on school grounds**

UNITED STATES CODE, TITLE 20

7151 Gun-Free Schools Act

COURT DECISIONS

*Reeves v. Rocklin Unified School District*, (2003) 109 Cal.App.4th 652

*In Re Joseph F.*, (2000) 85 Cal.App.4th 975

*In Re Jimi A.*, (1989) 209 Cal.App.3d 482

*In Re Oscar R.*, (1984) 161 Cal.App.3d 770

ATTORNEY GENERAL OPINIONS

79 *Ops.Cal.Atty.Gen.* 58 (1996)

*Management Resources:*CSBA PUBLICATIONS

*911! A Manual for Schools and the Media During a Campus Crisis*, 2001

U.S. DEPARTMENT OF EDUCATION PUBLICATIONS

***Guide for Developing High-Quality School Emergency Operations Plans*, 2013**

***Practical Information on Crisis Planning: A Guide for Schools and Communities*, May 2003**

BP 3515.2(c)

**DISRUPTIONS (continued)**

WEB SITES

CSBA: <http://www.csba.org>

California Department of Education, Safe Schools Office: <http://www.cde.ca.gov/ls/ss>

U.S. Department of Education, **Emergency Planning**: <http://www.ed.gov/admins/lead/safety/emergencyplan>

# CSBA Sample Administrative Regulation

## Business and Noninstructional Operations

AR 3515.2(a)

### DISRUPTIONS

The principal or designee may direct any person, except a student, school employee, or other person required by his/her employment to be on school grounds, to leave school grounds or school activity if:

1. The principal or designee has reasonable basis for concluding that the person is committing or has entered the campus with the purpose of committing an act which is likely to interfere with the peaceful conduct, discipline, good order, or administration of the school or a school activity, or with the intent of inflicting damage to any person or property. (Education Code 44810, 44811; Penal Code 626.7)
  2. The person fights or challenges another person to a fight, willfully disturbs another person by loud and unreasonable noise, or uses offensive language which could provoke a violent reaction. (Penal Code 415.5)
  3. The person, **without lawful business for being present**, loiters around a school **without lawful business for being present** or reenters a school within 72 hours after he/she was asked to leave. (Penal Code 653b)
  4. The person is required to register as a sex offender pursuant to Penal Code 290 and does not have a lawful purpose and written permission from the principal or designee to be on school grounds. (Penal Code 626.81)
- (cf. 1250 - Visitors/Outsiders)  
(cf. 3515.5 - Sex Offender Notification)
5. The person is a specified drug offender, as defined in Penal Code 626.85, and does not have written permission from the principal or designee to be on school grounds. However, such specified drug offender may be on school grounds during any school activity if he/she is a student or the parent/guardian of a student attending the school. (Penal Code 626.85)
  6. The person willfully or knowingly creates a disruption with the intent to threaten the immediate physical safety of **any students in grades K-6, staff, or others** while attending, arriving at, or leaving school. (Penal Code 626.8)
  7. The person has otherwise established a continued pattern of unauthorized entry on school grounds. (Penal Code 626.8)

(cf. 1240 - Volunteer Assistance)  
(cf. 3515.3 - District Police/Security Department)  
(cf. 4158/4258/4358 - Employee Security)  
(cf. 6145.2 - Athletic Competition)

The principal or designee shall allow a parent/guardian who was previously directed to leave school grounds to reenter for the purpose of retrieving his/her child for disciplinary reasons, medical attention, or family emergencies, or with the principal or designee's prior written permission. (Penal Code 626.7, 626.85)

When directing any person to leave school premises, the principal or designee shall inform the person that he/she may be guilty of a crime if he/she: **(Education Code 32211; Penal Code 626.7, 626.8, 636.85)**



AR 3515.2(b)

**DISRUPTIONS (continued)**

1. Fails to leave or remains after being directed to leave **(Penal Code 626.7, 626.8, 626.85)**
2. Returns to the campus without following the school's posted registration requirements **(Penal Code 626.7)**
3. Returns within seven days after being directed to leave **(Penal Code 626.8, 626.85)**

*(cf. 0450 - Comprehensive Safety Plan)*

**Whenever an individual is causing or threatening to cause a disruption at any district facility other than a school campus, the Superintendent or designee may direct that individual to leave the facility consistent with this regulation and the accompanying Board policy.**

**Appeal Procedure**

Any person who is asked to leave a school building or grounds may appeal to the Superintendent or designee. This appeal shall be made no later than the second school day after the person has departed from the school building or grounds. After reviewing the matter with the principal or designee and the person making the appeal, the Superintendent or designee shall render his/her decision within 24 hours after the appeal is made, and this decision shall be binding. (Education Code 32211)

The decision of the Superintendent or designee may be appealed to the Governing Board. Such an appeal shall be made no later than the second school day after the Superintendent or designee has rendered his/her decision. The Board shall consider and decide the appeal at its next scheduled regular or adjourned regular public meeting. The Board's decision shall be final. (Education Code 32211)

**In any circumstance where a person has been directed to leave a school building or ground where the Superintendent's or Board's office is situated, he/she may nevertheless enter the school building or ground solely for the purpose of making the appeal. (Education Code 32211)**

# CSBA Sample Board Policy

## Business and Noninstructional Operations BP 3515.5(a)

### SEX OFFENDER NOTIFICATION

The Superintendent or designee shall develop a plan for receiving and communicating information about registered sex offenders residing within district boundaries. He/she shall ensure, at a minimum, that the following components are part of the plan:

1. The Superintendent or designee shall appoint a staff member to serve as liaison with law enforcement regarding these matters.
2. The Superintendent or district liaison shall, at the beginning of each school year, contact local law enforcement to coordinate the receipt of information. Law enforcement shall be informed that all notifications and correspondence should be directed to the liaison as well as the individual school sites.
3. When law enforcement notifies the district of the residency or employment of a sex offender within district boundaries, the Superintendent or district liaison shall consult with law enforcement about the appropriate scope of the disclosure. When authorized by law enforcement, the Superintendent or liaison may disclose information about a sex offender to the following staff:
  - a. The principal of the school which is in the attendance area of the sex offender's residence or place of employment
  - b. Teachers and classified personnel at that school, including staff responsible for visitor registration  
(cf. [1250](#) - Visitors/Outsiders)
  - c. Principals and staff at adjacent schools, as appropriate
  - d. Security staff
  - e. Bus drivers
  - f. Yard supervisors
4. Any staff member who receives information directly from law enforcement regarding registered sex offenders shall immediately contact the Superintendent or liaison in order to help ensure that the district is able to respond appropriately.
5. If an identified sex offender is seen on or near school grounds or around any student, staff shall immediately contact the district liaison. A staff member may also inform local law enforcement.

#### Notification to Parents/Guardians

When law enforcement has determined that parents/guardians should be notified regarding the presence of a sex offender in the community, the Superintendent or district liaison shall collaborate with local law enforcement in order to determine an appropriate response. This response may include:

1. An article in a school or parent council newsletter notifying parents/guardians that law enforcement information about registered sex offenders is available at the local law enforcement agency headquarters and/or at the school office.

BP 3515.5(b)

**SEX OFFENDER NOTIFICATION** (continued)

shall encourage parents/guardians to contact local law enforcement and access the Department of Justice's Megan's Law Internet website for additional information.

2. A mailing, at law enforcement's expense, prepared by law enforcement, and printed on law enforcement letterhead and envelopes, notifying parents/guardians of the presence of registered sex offenders. This notification shall encourage

parents/guardians to contact local law enforcement and access the Department of Justice's Megan's Law Internet website for additional information.

3. A mailing of a letter, at district expense, prepared by law enforcement and printed on law enforcement letterhead and envelopes, notifying parents/guardians of the presence of registered sex offenders. This notification shall encourage parents/guardians to contact local law enforcement and access the Department of Justice's Megan's Law Internet website for additional information.

**Whenever the principal has granted permission to a person who is required to register as a sex offender pursuant to Penal Code 290 to come into a school building or upon school grounds to volunteer at the school, he/she shall notify the parent/guardian of each student at that school, at least 14 days in advance using one of the methods specified in Education Code 48981, that a registered sex offender has been granted such permission, the date(s) and times for which permission has been granted, and the parent/guardian's right to obtain information regarding the person from a designated law enforcement agency. (Penal Code 626.81)**

*(cf. 1240 - Volunteer Assistance)*

*(cf. 5145.6 - Parental Notifications)*

# CSBA Sample Administrative Regulation

Business and Noninstructional Operations

AR 3515.6(a)

## CRIMINAL BACKGROUND CHECKS FOR CONTRACTORS

Whenever the district contracts for school and classroom janitorial, school site administrative, school site grounds and landscape maintenance, student transportation, and school site food-related services, the Superintendent or designee shall ensure that the contracting entity certifies in writing that any employees who may come into contact with students have not. When the employees of any entity contracting with the district to provide specified services will have contact with students, the entity shall certify in writing to the Superintendent or designee that none of those employees has been convicted of a violent or serious felony as defined in Education Code 45122.1, unless the employee has received a certificate of rehabilitation and a pardon. In the case of a sole proprietor, the Superintendent or designee shall prepare and submit the employee's fingerprints to the Department of Justice. If any contracting employee who may have contact with students has been convicted of a violent or serious felony as defined, a certificate of rehabilitation and a pardon as required pursuant to Education Code 45125.1 shall be submitted to the Superintendent or designee before the contracting employee is authorized to perform the work for the district. (Education Code 45125.1)

These requirements shall apply to a sole proprietor or entity contracting with the district to provide any of the following services: (Education Code 45125.1, 45125.2)

1. School and classroom janitorial services
2. School site administrative services
3. School site grounds and landscape maintenance services
4. Student transportation services
5. School site food-related services
6. Construction, reconstruction, rehabilitation, or repair of a school facility

*(cf. 3540 - Transportation)*

*(cf. 3551 - Food Service Operations/Cafeteria Fund)*

*(cf. 3600 - Consultants)*

*(cf. 7140 - Architectural and Engineering Services)*

On a case-by-case basis, the Superintendent or designee may also require a contracting entity providing school site services, other than those listed above, to comply with these requirements. (Education Code 45125.1)

These requirements shall not apply. The Superintendent or designee may determine that criminal background checks will not be required if:

AR 3515.6(b)

**CRIMINAL BACKGROUND CHECKS FOR CONTRACTORS (continued)**

**1. if the Superintendent or designee determines that t**The contracting entity is providing services in an emergency or exceptional situation, such as when student health or safety is endangered or when repairs are needed to make school facilities safe and habitable. (Education Code 45125.1)

**2. In addition, these requirements shall not apply if the Superintendent or designee determines that t**The employees of the contracting entity will have limited contact with students. In determining whether a contract employee has limited contact with students, the Superintendent or designee shall consider the totality of the circumstances, including **the following** factors **such as: 1. T**he length of time the contractors will be on school grounds, **2. W**hether students will be in proximity with the site where the contractors will be working, **and 3. W**hether the contractors will be working by themselves or with others. (Education Code 45125.1)

Upon a determination that an employee **shall will** have limited contact with students, the Superintendent or designee shall take appropriate steps to protect the safety of any students **s** who may come in contact with this employee. (Education Code 45125.1)

These steps may include, but **are** not **be** limited to, ensuring that the employee is working during nonschool hours, providing for regular patrols or supervision of the site from district security or personnel, ensuring that the employee is not working alone when students are present, limiting the employee's access to school grounds, **and/or** providing the employee with a visible means of identification.

*(cf. 3515.3 - District Police/Security Department)*

**3. The contract is for the construction, reconstruction, rehabilitation, or repair of a school facility and either item #1 or #2 above applies or the district uses one or more of the following methods to ensure student safety: (Education Code 45125.2)**

**Other Facility Contractors**

**When the district contracts for construction, reconstruction, rehabilitation or repair of a school facility where the employees of the entity will have contact, other than limited contact with students, the Superintendent or designee shall ensure the safety of students by utilizing one or more of the following methods: (Education Code 45125.2)**

**1.a.** The installation of a physical barrier at the worksite to limit contact with students.

**2.b.** Continual supervision and monitoring of all employees of the entity by an employee of the entity whom the Department of Justice has ascertained has not been convicted of a violent or serious felony.

**The supervising employee may submit his/her fingerprints to the Department of Justice pursuant to Education Code 45125.1.**

AR 3515.6(c)

**CRIMINAL BACKGROUND CHECKS FOR CONTRACTORS (continued)**

**3.c.** Surveillance of employees of the entity by school personnel.

**These requirements shall not apply if the Superintendent or designee determines that the contracting entity is providing construction, reconstruction, rehabilitation, or repair services in an emergency or exceptional situation, such as when student health or safety is endangered or when repairs are needed to make school facilities safe and habitable. (Education Code 45125.2)**

*Legal Reference:*

EDUCATION CODE

41302.5 School districts, definition

45122.1 Classified employees, conviction of a violent or serious felony

45125.1 Criminal background checks for contractors

45125.2 Criminal background checks for construction

PENAL CODE

667.5 Prior prison terms, enhancement of prison terms

1192.7 Plea bargaining limitation

**Management Resources:**

WEB SITES

**Department of Justice: <https://oag.ca.gov/fingerprints>**

# CSBA Sample Board Policy

**Business and Noninstructional Operations**      BP 3515.7(a)

## FIREARMS ON SCHOOL GROUNDS

The Governing Board is committed to providing a safe environment for students, staff, and visitors on campus. The Superintendent or designee shall consult with local law enforcement, insurance carriers, and other appropriate individuals and agencies to address the security of school campuses.

*(cf. 3515 - Campus Security)*  
*(cf. 3515.2 - Disruptions)*  
*(cf. 3515.3 - District Police/Security Department)*  
*(cf. 4158/4258/4358 - Employee Security)*  
*(cf. 5131.4 - Student Disturbances)*  
*(cf. 5131.7 - Weapons and Dangerous Instruments)*

District policy regarding the possession of firearms and/or ammunition on school grounds shall be included in the district's comprehensive safety plan and shall be communicated to district staff, parents/guardians, and the community.

*(cf. 0450 - Comprehensive Safety Plan)*  
*(cf. 1112 - Media Relations)*  
*(cf. 1113 - District and School Web Sites)*  
*(cf. 1114 - District-Sponsored Social Media)*

Any person specified in Penal Code 626.9(l)-(o) and 30310 is authorized to possess a firearm and/or ammunition on school grounds. *School grounds* include, but are not limited to, school buildings, fields, storage areas, and parking lots.

### **OPTION 1:**

The Superintendent or designee shall not grant permission to any other individual to carry a firearm or ammunition on school grounds.

*(cf. 4116 - Probationary/Permanent Status)*  
*(cf. 4118 - Dismissal/Suspension/Disciplinary Action)*  
*(cf. 4218 - Dismissal/Suspension/Disciplinary Action)*

No staff member shall be required to carry a firearm and/or ammunition while on school grounds.

*(cf. 3580 - District Records)*

*Legal Reference: (see next page)*

BP 3515.7(b)

**FIREARMS ON SCHOOL GROUNDS (continued)**

*Legal Reference:*

EDUCATION CODE

32281 *Comprehensive safety plan*

35160 *Powers and duties of the board*

35161 *Powers and duties of the board; authority to delegate*

38001.5 *District security officers; requirements if carry firearm*

PENAL CODE

626.9 *Gun Free School Zone Act*

830.32 *District police department; district decision to authorize carrying of firearm*

16150 *Definition of ammunition*

16520 *Definition of firearm*

26150-26225 *Concealed weapons permit*

30310 *Prohibition against ammunition on school grounds*

UNITED STATES CODE, TITLE 18

921 *Definitions, firearms and ammunition*

922 *Firearms, unlawful acts*

923 *Firearm licensing*

UNITED STATES CODE, TITLE 20

7151 *Gun-Free Schools Act; student expulsions for possession of firearm*



# CSBA Sample Administrative Regulation

**Business and Noninstructional Operations**

**AR 3516.3(a)**

## **EARTHQUAKE EMERGENCY PROCEDURE SYSTEM**

### Earthquake Preparedness

Earthquake emergency procedures shall be established in every school building having an occupant capacity of 50 or more students, or more than one classroom, and shall be incorporated into the comprehensive safety plan. (Education Code 32282)

*(cf. 0450 - Comprehensive Safety Plan)*

Earthquake emergency procedures shall be aligned with the Standardized Emergency Management System and the National Incident Management System. (Government Code 8607; 19 CCR 2400-2450)

*(cf. 3516 - Emergencies and Disaster Preparedness Plan)*

The Superintendent or designee may work with the **California Emergency Management Agency California Governor's Office of Emergency Services** and the Seismic Safety Commission to develop and establish the earthquake emergency procedures. (Education Code 32282)

Earthquake emergency procedures shall outline the roles and responsibilities of students and staff during and after an earthquake.

Earthquake emergency procedures shall include, but not be limited to, all of the following: (Education Code 32282)

1. A school building disaster plan, ready for implementation at any time, for maintaining the safety and care of students and staff
2. A drop procedure whereby each student and staff member takes cover under a table or desk, dropping to his/her knees, with the head protected by the arms and the back to the windows
3. Protective measures to be taken before, during, and following an earthquake
4. A program to ensure that students and staff are aware of and properly trained in the earthquake emergency procedure system

*(cf. 4131 - Staff Development)*

*(cf. 4231 - Staff Development)*

*(cf. 4331 - Staff Development)*

Staff and students shall be informed of the dangers to expect in an earthquake and procedures to be followed. Students shall be instructed to remain silent and follow directions given by staff in such an emergency. Staff and students also shall be taught safety precautions to take if they are in the open or on the way to or from school when an earthquake occurs.

AR 3516.3(b)

### **EARTHQUAKE EMERGENCY PROCEDURE SYSTEM (continued)**

Earthquake emergency procedures shall designate primary and alternative locations outside of buildings, which may include areas off campus if necessary, where individuals on a school site will assemble following evacuation. In designating such areas, the Superintendent or designee shall consider potential post-earthquake hazards outside school buildings including, but not limited to, power lines, trees, covered walkways, chain link fences that may be an electric shock hazard, and areas near buildings that may have debris.

Earthquake emergency procedures also shall outline primary and alternative evacuation routes that avoid areas with potential hazards to the extent possible. The needs of students with disabilities shall be considered when planning evacuation routes.

The Superintendent or designee shall consider the danger of a post-earthquake tsunami when developing evacuation routes and locations, including the need to evacuate to higher ground.

The Superintendent or designee shall identify at least one individual within each building to determine if an evacuation is necessary, the best evacuation location, and the best route to that location when an earthquake occurs.

The Superintendent or designee shall identify potential earthquake hazards in classrooms and other district facilities, including, but not limited to, areas where the main gas supply or electric current enters the building, suspended ceilings, pendant light fixtures, large windows, stairwells, science laboratories, storage areas for hazardous materials, shop areas, and unsecured furniture and equipment. To the extent possible, dangers presented by such potential hazards shall be minimized by securing equipment and furnishings and removing heavy objects from high shelves.

#### **Earthquake While Indoors at School**

When an earthquake occurs, the following actions shall be taken inside buildings and classrooms:

1. Staff shall have students perform the drop procedure. Students should stay in the drop position until the emergency is over or until further instructions are given.
2. In laboratories, burners should be extinguished, if possible, before taking cover.
3. As soon as possible, staff shall move students away from windows, shelves, and heavy objects or furniture that may fall.

Note: In The ABCs of Post-Earthquake Evacuation: A Checklist for School Administrators and Faculty, the **Cal EMA Cal OES** advises that evacuation should never be automatic as there may be as much danger outside the facility as inside, planned routes may not be clear, and lighting inside the building may be shut off.

4. After the earthquake, the principal or designee shall determine whether planned evacuation routes and assembly locations are safe and shall communicate with teachers and other staff.
5. When directed by the principal or designee to evacuate, or if classrooms or other facilities present dangerous hazards that require immediate evacuation, staff shall account for all students under their supervision and shall evacuate the building in an orderly manner.

AR 3516.3(c)

### **EARTHQUAKE EMERGENCY PROCEDURE SYSTEM (continued)**

#### Earthquake While Outdoors on School Grounds

When an earthquake occurs, the following actions shall be taken by staff or other persons in authority who are outdoors on school grounds:

1. Staff shall direct students to walk away from buildings, trees, overhead power lines, power poles, or exposed wires.
2. Staff shall have students perform the drop procedure.
3. Staff shall have students stay in the open until the earthquake is over or until further directions are given.

#### Earthquake While on the Bus

If students are on the school bus when an earthquake occurs, the bus driver shall take proper precautions to ensure student safety, which may include pulling over to the side of the road or driving to a location away from outside hazards, if possible. Following the earthquake, the driver shall contact the Superintendent or designee for instructions before proceeding on the route or, if such contact is not possible, drive to an evacuation or assembly location.

*(cf. 3543 - Transportation Safety and Emergencies)*

#### Subsequent Emergency Procedures

After an earthquake episode has subsided, the following actions shall be taken:

1. Staff shall extinguish small fires if safe.
2. Staff shall provide first aid to any injured students, take roll, and report missing students to the principal or designee.
3. Staff and students shall refrain from lighting any stoves or burners or operating any electrical switches until the area is declared safe.
4. All buildings shall be inspected for water and gas leaks, electrical breakages, and large cracks or earth slippage affecting buildings.
5. The principal or designee shall post staff at safe distances from all building entrances and instruct staff and students to remain outside the buildings until they are declared safe.
6. The principal or designee shall request assistance as needed from the county or city civil defense office, fire and police departments, city and county building inspectors, and utility companies and shall confer with them regarding the advisability of closing the school.
7. The principal or designee shall contact the Superintendent or designee and request further instructions after assessing the earthquake damage.

AR 3516.3(d)

**EARTHQUAKE EMERGENCY PROCEDURE SYSTEM (continued)**

8. The Superintendent or designee shall provide updates to parents/guardians of district students and members of the community about the incident, any safety issues, and follow-up directions.

(cf. 1112 - Media Relations)

*Legal Reference:*

EDUCATION CODE

32280-32289 School safety plans

GOVERNMENT CODE

3100 Public employees as disaster service workers

8607 Standardized Emergency Management System

CODE OF REGULATIONS, TITLE 19

2400-2450 Standardized Emergency Management System

*Management Resources:*

**CALIFORNIA EMERGENCY MANAGEMENT AGENCY CALIFORNIA GOVERNOR'S OFFICE OF EMERGENCY SERVICES PUBLICATIONS**

The ABCs of Post-Earthquake Evacuation: A Checklist for School Administrators and Faculty

Guide and Checklist for Nonstructural Earthquake Hazards in California Schools, January 2003

School Emergency Response: Using SEMS at Districts and Sites, June 1998

FEDERAL EMERGENCY MANAGEMENT AGENCY PUBLICATIONS

Guidebook for Developing a School Earthquake Safety Program, 1990

WEB SITES

American Red Cross: <http://www.redcross.org>

California Emergency Management Agency: <http://www.calema.ca.gov>

California Governor's Office of Emergency Services: <http://www.caloes.ca.gov>

California Seismic Safety Commission: <http://www.seismic.ca.gov>

Federal Emergency Management Agency: <http://www.fema.gov/hazards/earthquakes>

National Incident Management System: <http://www.fema.gov/emergency/nims>

# CSBA Sample Board Policy

Business and Noninstructional Operations

BP 3541.2(a)

## TRANSPORTATION FOR STUDENTS WITH DISABILITIES

The Governing Board desires to meet the transportation needs of students with disabilities to enable them to benefit from special education and related services. The Governing Board shall ensure that The district shall provide appropriate transportation services are provided for a students with disabilities as specified in when the district is the student's district of residence and the transportation services are required by their his/her individualized education program (IEP) or Section 504 accommodation plan. The district shall make home-to-school transportation available for students at no cost to parents/guardians as specified in the student's IEP.

*(cf. 0430 - Comprehensive Local Plan for Special Education)*  
*(cf. 3540 - Transportation)*  
*(cf. 6159 - Individualized Education Program (IEP))*  
*(cf. 6164.4 - Identification and Evaluation of Individuals for Special Education)*  
*(cf. 6164.6 - Identification and Education Under Section 504)*

The Superintendent or designee shall establish criteria and procedures for determining the most appropriate mode of transportation for an individual student based on identified needs as determined in the IEP or accommodation plan.

The specific needs of the student shall be the primary consideration when an IEP team is determining the student's transportation needs. Considerations may include, but are not limited to, the student's health needs, travel distances, physical accessibility and safety of streets and sidewalks, accessibility of public transportation systems, midday or other transportation needs, extended-year services, and, as necessary, implementation of a behavioral intervention plan.

The Superintendent or designee shall provide IEP teams with information about district transportation services in order to assist them in making decisions as to the mode, schedule, and location of transportation services that may be available to each student with disabilities. The IEP team may communicate with district transportation staff and/or invite transportation staff to attend IEP team meetings where the student's transportation needs will be discussed.

Transportation services specified in a student's IEP or Section 504 plan shall be provided at no cost to the student or his/her parent/guardian.

*(cf. 3250 - Transportation Fees)*

If the disabled a student whose IEP or accommodation plan specifies transportation needs is excluded from school bus transportation for any reason, such as suspension, expulsion, or other reason, the district shall provide alternative transportation at no cost to the student or parent/guardian provided that transportation is specified in the student's IEP. (Education Code 48915.5)

*(cf. 5131.1 - Bus Conduct)*  
*(cf. 5144.2 - Suspension and Expulsion/Due Process (Students with Disabilities))*

BP 3541.2(b)

**TRANSPORTATION FOR STUDENTS WITH DISABILITIES (continued)**

**When contracting with a nonpublic, nonsectarian school or agency to provide special education services, the Superintendent or designee shall ensure that the contract includes general administrative and financial agreements related to the provision of transportation services if specified in the student's IEP. (Education Code 56366)**

*(cf. 6159.2 - Nonpublic, Nonsectarian School and Agency Services for Special Education)*

The Superintendent or designee shall arrange transportation schedules so that students with disabilities do not spend an excessive amount of time on buses compared to other students. Arrivals and departures shall not reduce the length of the school day for these students except as may be prescribed on an individual basis.

*(cf. 0410 - Nondiscrimination in District Programs and Activities)*

*(cf. 3541 - Transportation Routes and Services)*

The Superintendent or designee shall **establish procedures to ensure compatibility between that any mobile seating devices used on district buses and are compatible with bus securement systems required by 49 CFR 571.222. (Education Code 56195.8)**

*(cf. 3542 - School Bus Drivers)*

**As necessary, a student with disabilities may be accompanied on school transportation by a service animal, as defined in 28 CFR 35.104, including a specially trained guide dogs, signal dogs, and or service dogs trained to provide assistance to disabled persons may be transported in a school bus when accompanied by disabled students, disabled teachers, or persons training the dogs. (Education Code 39839; Civil Code 54.1-54.2; 28 CFR 35.136)**

*(cf. 6163.2 - Animals at School)*

**When transportation is not specifically required by the IEP or Section 504 plan of a student with disabilities, the student shall be subject to the rules and policies regarding regular transportation offerings within the district.**

*Legal Reference:*

**EDUCATION CODE**

39807.5 *Payment of transportation cost*

39839 *Guide dogs, signal dogs, and service dogs on bus*

41850-41854 *Allowances for transportation*

48300-48315 *Alternative interdistrict attendance program*

48915.5 *Expulsion of students with exceptional needs*

**56040 *No cost for special education and related services***

56195.8 *Adoption of policies*

56327 *Assessment for special education and related services*

56345 *Individualized education program*

**56366 56365-56366.1 *Nonpublic nonsectarian schools or agencies***

**56366.1 *Waiver of requirements under section 56365 and 56366***

**CIVIL CODE**

**54.1-54.2 *Service animals***

**CODE OF REGULATIONS, TITLE 5**

**15050 *Transfer of funds to child development fund and development center for handicapped pupils fund***

15243 *Physically handicapped minors*

May 9, 2018

BP 3541.2(c)

**TRANSPORTATION FOR STUDENTS WITH DISABILITIES (continued)***15271 Exclusion from report*UNITED STATES CODE, TITLE 20*1400-1482 Individuals with Disabilities Education Act*UNITED STATES CODE, TITLE 29*794 Section 504 of the Rehabilitation Act of 1973***CODE OF FEDERAL REGULATIONS, TITLE 28****35.104 Definitions****35.136 Service animals***Legal Reference: (continued)*CODE OF FEDERAL REGULATIONS, TITLE 34*104.4 Equal opportunity under the Rehabilitation Act of 1973, Section 504***300.1-300.818 Individuals with Disabilities Education Act, especially:****300.34 Transportation defined as related service**CODE OF FEDERAL REGULATIONS, TITLE 49*571.222 Federal requirements for bus securement systems**Management Resources:***CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS****Special Education Transportation Guidelines****Pupil Fees, Deposits and Other Charges, Fiscal Management Advisory 12-02, April 24, 2013****0609.95 School transportation fee exemption for handicapped children and pupils whose parents or guardians are indigent (LO: 2-95)****0500.92 Implementation of Special Education Transportation Apportionment (#92-02)****U.S. DEPARTMENT OF EDUCATION PUBLICATIONS****Protecting Students with Disabilities: Frequently Asked Questions About Section 504 and the Education of Children with Disabilities, 2009****Questions and Answers on Serving Children with Disabilities Eligible for Transportation, 2009****WEB SITES****California Department of Education: <http://www.cde.ca.gov>****U.S. Department of Education: <http://www.ed.gov>**

# CSBA Sample Administrative Regulation

## Business and Noninstructional Operations

AR 3543(a)

### TRANSPORTATION SAFETY AND EMERGENCIES

Cautionary Notice: Government Code 17581.5 relieves districts from the obligation to perform specified mandated activities when the Budget Act does not provide reimbursement during that fiscal year. The Budget Act of **2015 (AB 93, Ch. 10, Statutes of 2015) 2016 (SB 826, Ch. 23, Statutes of 2016)** extends the suspension of these requirements through the **2015-16 2016-17** fiscal year. As a result, certain provisions of the following administrative regulation related to transportation safety plans and safety instruction for students may be suspended.

Note: The following regulation is for use by districts that provide school bus transportation services and employ their own school bus drivers. Districts that contract out for all transportation services may revise this regulation as appropriate to ensure that the contracting firm meets all legal requirements regarding transportation safety.

Each day, prior to driving a school bus, each school bus driver shall inspect the bus to ensure that it is in safe operating condition and equipped as required by law and that all equipment is in good working order. At the completion of each day's work, the driver shall prepare and sign a written report of the condition of the equipment **listed specified** in 13 CCR 1215, **including The report shall indicate** any defect or deficiency discovered by or reported to **him/her the driver** which would affect safe operation or result in mechanical breakdown of the bus, or, **indicating that if** no defect or deficiency was discovered or reported, **shall so indicate**. Any defect or deficiency that would affect safe operation shall be repaired prior to operating the bus. (13 CCR 1215)

*(cf. 3540 - Transportation)*

*(cf. 3541.1 - Transportation for School-Related Trips)*

*(cf. 3542 - School Bus Drivers)*

**In the event of a school bus accident, the driver shall immediately notify the California Highway Patrol, the Superintendent or designee, and, if the bus is operated under contract, the driver's employer. The driver shall not leave the immediate vicinity of the bus to seek aid unless necessary. (13 CCR 1219) [MOVED DOWN]**

**The Superintendent or designee shall review all investigations of bus incidents and accidents to develop preventative measures. [MOVED DOWN]**

**(cf. 4112.42/4212.42/4312.42 - Drug and Alcohol Testing for School Bus Drivers)**

## Passenger Restraint Systems

Note: Pursuant to Vehicle Code 27316 and 27316.5, any school bus or student activity bus purchased or leased for use in California must be equipped with a passenger restraint system if the bus was manufactured on or after the dates specified in law, as described below. Although it is the manufacturer's responsibility to ensure installation of appropriate passenger restraint systems, the district should be aware that buses manufactured or purchased from outside California may need to be modified to comply with the state's requirements. In addition, according to the California Department of Education's (CDE) Passenger Restraints Frequently Asked Questions, districts may, but are not required to, retrofit older school buses with passenger restraint systems **with the original equipment manufacturer's approval**. In determining whether to retrofit buses, the CDE recommends that districts consider the age of the bus, the total cost of the retrofit, and the required reinspection of the bus by the California Highway Patrol.



AR 3543(b)

**TRANSPORTATION SAFETY AND EMERGENCIES (continued)**

The Superintendent or designee shall ensure that any school bus or student activity bus which is purchased or leased by the district is equipped with a combination pelvic and upper torso passenger restraint system at all designated seating positions if that bus: (Vehicle Code 27316, 27316.5; 13 CCR 1201)

1. Is a Type 1 school bus manufactured on or after July 1, 2005 which is designed for carrying more than 16 passengers and the driver
2. Is a Type 2 school bus or student activity bus manufactured on or after July 1, 2004 which meets one of the following criteria:
  - a. Is designed for carrying 16 or fewer passengers and the driver
  - b. Has a manufacturer's vehicle weight rating of 10,000 pounds or less and is designed for carrying not more than 20 passengers and the driver

Note: The following optional paragraph reflects legislative intent of Vehicle Code 27316.

The Superintendent or designee shall prioritize the allocation of school buses purchased, leased, or contracted to ensure that elementary students receive first priority for new school buses equipped with passenger restraint systems whenever feasible.

When a school bus or student activity bus is equipped with a passenger restraint system, all passengers shall use the passenger restraint system. (5 CCR 14105)

Note: Pursuant to Vehicle Code 27316, no person, district, or organization may be held criminally liable if a passenger improperly uses or fails to use the passenger restraint system. However, the CDE's Passenger Restraints Frequently Asked Questions encourages districts to develop procedures to enforce disciplinary actions for nonuse or improper use of the passenger restraint system.

The following optional paragraph may be expanded to specify the steps that should be taken by the driver to reasonably ensure that all passengers are properly restrained (e.g., verbal instructions to students, visual inspection), which may vary depending on the age/grade levels of the students. Such steps also may be incorporated in district regulations adopted pursuant to 5 CCR 14103 related to student conduct on buses, bus driver authority, and the suspension of riding privileges; see BP/AR 5131.1 - Bus Conduct.

Bus drivers shall be instructed regarding procedures to enforce the proper use of the passenger restraint system. Students who fail to follow instructions of the bus driver may be subject to discipline, including suspension of riding privileges, in accordance with Board policy and administrative regulations.

*(cf. 5131.1 - Bus Conduct)*  
*(cf. 5144 - Discipline)*

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**TRANSPORTATION SAFETY AND EMERGENCIES (continued)****Fire Extinguishers**

Each school bus shall be equipped with at least one fire extinguisher located in the driver's compartment which meets the standards specified in law. In addition, a wheelchair school bus shall have another fire extinguisher placed at the wheelchair loading door or emergency exit. All fire extinguishers shall be regularly inspected and serviced in accordance with regulations adopted by the State Fire Marshal. (Education Code 39838; 13 CCR 1242; 19 CCR 574-575.3)

**Electronic Communications Devices**

Note: Vehicle Code 23123 prohibits any person from driving a motor vehicle while using a wireless telephone, except under the conditions described below. Pursuant to the definitions in Vehicle Code 415 and 545, a "motor vehicle" would include a school bus or student activity bus. In addition, Vehicle Code 23125 prohibits a person from driving a school bus while using a wireless telephone except for work-related or emergency purposes. Vehicle Code 23123.5, as amended by AB 1785 (Ch. 660, Statutes of 2016), prohibits the driver of a motor vehicle (including a school bus or school activity bus pursuant to Vehicle Code 415 and 545) from using an electronic wireless communications device for any purpose, including, but not limited to, text-based communication, but provides an exception for voice-operated and hands-free operation or for a function that requires only a single swipe or tap of the driver's finger as long as the device is mounted on the windshield, dashboard, or center console of the vehicle. The following paragraph limits the use of any electronic communications device to work-related or emergency purposes. The district should consult legal counsel if it is considering allowing broader use of such devices.

A bus driver shall not drive is prohibited from driving a school bus or student activity bus while using a wireless telephone except under the following conditions: (Vehicle Code 23123, 23125) or other electronic wireless communications device except for work-related or emergency purposes, including, but not limited to, contacting a law enforcement agency, health care provider, fire department, or other emergency service agency or entity. In any such permitted situation, the driver shall only use a wireless telephone or device that is specifically designed and configured to allow voice-operated and hands-free operation or a function that requires only a single swipe or tap of the driver's finger provided the device is mounted on the windshield, dashboard, or center console of the bus. (Vehicle Code 23123.5, 23125)

1. When he/she uses a wireless telephone that is specifically designed and configured to allow hands-free listening and talking, provided it is used in that manner while driving
2. For emergency purposes, including, but not limited to, a call to a law enforcement agency, health care provider, fire department, or other emergency service agency or entity
3. For work-related purposes

*(cf. 3513.1 - Cellular Phone Reimbursement)*

Note: Vehicle Code 23123.5 generally prohibits any person from driving a motor vehicle while using an electronic wireless communications device for text-based communication. AB 1536 (Ch. 92, Statutes of 2012) amended Vehicle Code 23123.5 to add an exception for the use of voice-operated and hands-free operation of an electronic wireless communications device. At its discretion, the district may establish conditions that are more restrictive than law and should revise the following paragraph accordingly.

AR 3543(d)

## TRANSPORTATION SAFETY AND EMERGENCIES (continued)

**A bus driver shall not drive while using an electronic wireless communications device to write, send, or read a text-based communication, including, but not limited to, text messages, instant messages, and email, unless the device is specifically designed and configured to allow voice-operated and hands-free operation and is used in that manner. This prohibition does not include reading, selecting, or entering a telephone number or name in an electronic wireless communications device for the purpose of making or receiving a telephone call. (Vehicle Code 23123.5)**

### Safe Bus Operations

Note: Pursuant to Education Code 39834, any Governing Board member, employee, or other person who knowingly operates or permits operation of a school bus in excess of its seating capacity is guilty of a misdemeanor. However, the Board is authorized to adopt policy that allows seating capacities to be exceeded in cases of emergency; see BP/AR 3516 - Emergencies and Disaster Preparedness Plan.

School buses and student activity buses shall not be operated whenever the number of passengers exceeds bus seating capacity, except when necessary in emergency situations which require that individuals be transported immediately to ensure their safety. (Education Code 39834)

*(cf. 3516 - Emergencies and Disaster Preparedness Plan)*

Note: Vehicle Code 34501.6 mandates any district that provides student transportation to adopt procedures that limit bus operation when atmospheric conditions reduce visibility, as described below, and that give drivers for school activity trips discretionary authority to discontinue operation when it is unsafe.

School bus operations shall be limited when atmospheric conditions reduce visibility on the roadway to 200 feet or less during regular home-to-school transportation service. Bus drivers for school activity trips may discontinue bus operation whenever they determine that it is unsafe to continue operation because of reduced visibility. (Vehicle Code 34501.6)

### Unauthorized Entry

The Superintendent or designee may place a notice at bus entrances that warns against unauthorized entry. The driver or another school official may order any person to disembark if that person enters a bus without prior authorization. (Education Code 39842; 13 CCR 1256.5)

*(cf. 3515.2 - Disruptions)*

### Transportation Safety Plan for Boarding and Exiting Buses

Note: The district should modify items #1-2 below to reflect grade levels offered by the district. A district that does not maintain any of grades prekindergarten through 8 should delete items #1-2.

The Superintendent or designee shall develop a transportation safety plan containing procedures for school personnel to follow to ensure the safe transport of students. The plan shall **include address** all of the following: (Education Code 39831.3)

AR 3543(e)

**TRANSPORTATION SAFETY AND EMERGENCIES (continued)**

1. **Procedures for dd**etermining if students in grades prekindergarten through 8 require an escort to cross a private road or highway at a bus stop pursuant to Vehicle Code 22112
2. Procedures for all students in grades prekindergarten through 8 to follow as they board and exit the bus at their bus stops
3. **Procedures for bB**oarding and exiting a school bus at a school or other trip destination

**Note: SB 1072 (Ch. 721, Statutes of 2016) amended Education Code 39831.3 to require that the transportation plan include the procedures specified in items #4-5 below.**

**4. Procedures to ensure that a student is not left unattended on a school bus, student activity bus, or youth bus**

**Note: The procedures included in the transportation safety plan to ensure that a student is not left unattended on a bus may include the requirements of Vehicle Code 28160, as added by SB 1072 (Ch. 721, Statutes of 2016). Pursuant to Vehicle Code 28160, on or before the beginning of the 2018-19 school year, each school bus, school activity bus, youth bus, and child care motor vehicle (i.e., vehicle designed, used, or maintained for more than eight persons, including the driver, that is used by a child**

**care provider to transport children) must be equipped with a "child safety alert system" (i.e., a device located at the interior rear of a vehicle that requires the driver to either manually contact or scan the device before exiting the vehicle). Student activity buses may be exempt from this requirement if certain procedures are followed, as specified in Vehicle Code 28160.**

**Such procedures shall include, on or before the beginning of the 2018-19 school year, the installation of a child safety alert system at the interior rear of each bus that requires the driver to either manually contact or scan the device, thereby prompting the driver to inspect the entirety of the interior of the vehicle before exiting. A student activity bus may be exempt from this requirement under the conditions specified in Vehicle Code 28160.**

**5. Procedures and standards for designating an adult chaperone, other than the driver, to accompany students on a school activity bus**

A copy of the plan shall be kept at each school site and made available upon request to the California Highway Patrol (**CHP**). (Education Code 39831.3)

**Parental Notifications**

Note: The following section is for use by districts that offer any of grades prekindergarten through 6 and should be revised to reflect the grade levels offered by the district.

The Superintendent or designee shall provide written safety information to the parents/guardians of all students in grades prekindergarten through 6 who have not previously been transported in a **district** school bus or student activity bus. This information shall be provided upon registration and shall contain: (Education Code 39831.5)

AR 3543(f)

**TRANSPORTATION SAFETY AND EMERGENCIES (continued)**

1. A list of school bus stops near each student's home
2. General rules of conduct at school bus loading zones
3. Red light crossing instructions
4. A description of the school bus danger zone
5. Instructions **for safety while safely** walking to and from school bus stops

*(cf. 5145.6 - Parental Notifications)*

**Student Instruction**

Students who are transported in a school bus or student activity bus shall receive instruction in school bus emergency procedures and passenger safety as follows: (Education Code 39831.5; 5 CCR 14102)

1. Each year, all students who receive home-to-school transportation in a school bus shall be provided appropriate instruction in safe riding practices and emergency evacuation drills.

Note: Item #2 below is for use by districts that offer any of grades prekindergarten through 8 and should be revised to reflect the grade levels offered by the district.

2. At least once each school year, all students in grades prekindergarten through 8 who receive home-to-school transportation shall receive safety instruction which includes, but is not limited to:
  - a. Proper loading and unloading procedures, including escorting by the driver
  - b. How to safely cross the street, highway, or private road
  - c. In school buses with passenger restraint systems, instruction in the use of such systems as specified in 5 CCR 14105, including, but not limited to, the proper fastening and release of the passenger restraint system, acceptable placement of passenger restraint systems on students, times at which the passenger restraint systems should be fastened and released, and acceptable placement of the passenger restraint systems when not in use
  - d. Proper passenger conduct
  - e. Bus evacuation procedures
  - f. Location of emergency equipment

As part of this instruction, students shall evacuate the school bus through emergency exit doors. Instruction also may include responsibilities of passengers seated next to an emergency exit.

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**TRANSPORTATION SAFETY AND EMERGENCIES (continued)**

Each time the above instruction is given, the following information shall be documented:

- a. District name
- b. School name and location
- c. Date of instruction
- d. Names of supervising adults
- e. Number of students participating
- f. Grade levels of students
- g. Subjects covered in instruction
- h. Amount of time taken for instruction
- i. Bus driver's name
- j. Bus number
- k. Additional remarks

This documentation shall be kept on file at the district office or the school for one year and shall be available for inspection by the **California Highway Patrol CHP**.

***(cf. 3580 - District Records)***

Note: Item #3 below applies to all students in grades prekindergarten through 12 **and may be revised to reflect grade levels offered by the district**.

3. Before departing on a school activity trip, all students riding on a school bus or student activity bus shall receive safety instruction which includes, but is not limited to, the location of emergency exits and the location and use of emergency equipment. This instruction also may include responsibilities of passengers seated next to an emergency exit.

**Bus Accidents**

**In the event of a school bus accident, the driver shall immediately notify the CHP, and the Superintendent or designee, and, if the bus is operated under contract, the driver's employer. The driver shall not leave the immediate vicinity of the bus to seek aid unless necessary. (13 CCR 1219)**

AR 3543(h)

**TRANSPORTATION SAFETY AND EMERGENCIES (continued)**

**The Superintendent or designee shall maintain a report of each accident that occurred on public or private property involving a school bus with students aboard. The report shall contain pertinent details of the accident and shall be retained for 12 months from the date of the accident. If the accident was not investigated by the CHP, the Superintendent or designee shall forward a copy of the report to the local CHP within five work days of the date of the accident. (13 CCR 1234)**

**The Superintendent or designee shall review all investigations of bus incidents and accidents to develop preventative measures.**

*(cf. 4112.42/4212.42/4312.42 - Drug and Alcohol Testing for School Bus Drivers)*

*Legal Reference:*EDUCATION CODE39830-398423 *Transportation, school buses***39860 Contract for transportation; requirement that student not be left unattended**51202 *Instruction in personal and public health and safety*PENAL CODE241.3 *Assault against school bus driver*243.3 *Battery against school bus driver*VEHICLE CODE415 *Definition of motor vehicle*545-546 *Definition of school bus and student activity bus*22112 *Loading and unloading passengers***23123 Use of wireless telephone prohibited while driving motor vehicle****23123.5 Text communications prohibited while driving motor vehicle Use of wireless telephone or communications device while driving; exceptions**23125 *Use of wireless telephone prohibited while driving school bus*27316-27316.5 *Passenger restraint systems***28160 Child safety alert system**34500 *California Highway Patrol responsibility to regulate safe operation of school buses*34501.5 *California Highway Patrol responsibility to adopt rules re: safe operation of school buses*34501.6 *School buses; reduced visibility*34508 *California Highway Patrol responsibility to adopt rules re: equipment and bus operations of school buses*CODE OF REGULATIONS, TITLE 514100-14105 *School buses and student activity buses*CODE OF REGULATIONS, TITLE 131200-1293 *Motor carrier safety*2480 *Airborne toxic control measure; limitation on bus idling*CODE OF REGULATIONS, TITLE 19574-575.3 *Inspection and maintenance of fire extinguishers*CODE OF FEDERAL REGULATIONS, TITLE 49571.1-571.500 *Motor vehicle standards, including school buses***Management Resources: (see next page)**

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**TRANSPORTATION SAFETY AND EMERGENCIES (continued)**

*Management Resources:*

**CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS**

**Passenger Restraints Frequently Asked Questions**

**WEB SITES**

*California Association of School Business Officials: <http://www.casbo.org>*

***American School Bus Council: <http://www.americanschoolbuscouncil.org>***

*California Association of School Transportation Officials: <http://www.castoways.org>*

*California Department of Education, Office of School Transportation: <http://www.cde.ca.gov/ls/tn>*

*California Highway Patrol: <http://www.chp.ca.gov>*

***National Coalition for School Bus Safety: <http://www.ncsbs.org>***

*National Transportation Safety Board: <http://www.ntsb.gov>*

*U.S. Department of Transportation, National Highway Traffic Safety Administration: <http://www.nhtsa.dot.gov>*



# CSBA Sample Administrative Regulation

**Business and Noninstructional Operations** AR 3550(a)

## FOOD SERVICE/CHILD NUTRITION PROGRAM

The Governing Board recognizes that adequate, nourishing food is essential to student health, development, and ability to learn. The Superintendent or designee shall develop strategies to increase students' access to the district's food service programs and to maximize their participation in available programs.

Foods and beverages available through the district's food service program shall:

1. Be carefully selected so as to contribute to students' nutritional well-being and the prevention of disease

(cf. [5141.27](#) - *Food Allergies/Special Dietary Needs*)

2. Meet or exceed nutrition standards specified in law and administrative regulation

(cf. [3552](#) - *Summer Meal Program*)

(cf. [3554](#) - *Other Food Sales*)

(cf. [5030](#) - *Student Wellness*)

(cf. [5148](#) - *Child Care and Development*)

(cf. [5148.2](#) - *Before/After School Programs*)

(cf. [5148.3](#) - *Preschool/Early Childhood Education*)

3. Be prepared in ways that will appeal to students, retain nutritive quality, and foster lifelong healthful eating habits

4. Be served in age-appropriate portions

5. Be available to students who meet federal eligibility criteria at no cost or at reduced prices, and to other students at reasonable prices

(cf. [3551](#) - *Food Service Operations/Cafeteria Fund*)

(cf. [3553](#) - *Free and Reduced Price Meals*)

The district's food service program shall give priority to serving unprocessed foods and fresh fruits and vegetables. District schools are encouraged to establish school gardens and/or farm-to-school projects to increase the availability of safe, fresh, seasonal fruits and vegetables for school meals and to support the district's nutrition education program.

(cf. [6142.8](#) - *Comprehensive Health Education*)

To encourage student participation in school meal programs, schools may offer multiple choices of food items within a meal service, provided all food items meet nutrition standards and all students are given an opportunity to select any food item.

The Superintendent or designee may invite students and parents/guardians to participate in the selection of foods of good nutritional quality for school menus.

AR 3550(b)

**Business and Noninstructional Operations (continued)**

The Board desires to provide students with adequate time and space to eat meals. To the extent possible, school, recess, and transportation schedules shall be designed to encourage participation in school meal programs. The Superintendent or designee shall periodically review the adequacy of school facilities for cafeteria eating and food preparation.

(cf. [1312.4](#) - *Williams Uniform Complaint Procedures*)

(cf. [3517](#) - *Facilities Inspection*)

(cf. [7110](#) - *Facilities Master Plan*)

In accordance with law, the Superintendent or designee shall develop and maintain a food safety program in order to reduce the risk of foodborne hazards at each step of the food preparation process, from receiving to service.

*Legal Reference:***EDUCATION CODE**

[35182.5](#) *Contracts, non-nutritious beverages*

[38080-38103](#) *Cafeteria, establishment and use*

[45103.5](#) *Contracts for management consulting services; restrictions*

[49430-49436](#) *Pupil Nutrition, Health, and Achievement Act of 2001*

[49490-49494](#) *School breakfast and lunch programs*

[49500-49505](#) *School meals*

[49510-49520](#) *Nutrition*

[49530-49536](#) *Child Nutrition Act*

[49540-49546](#) *Child care food program*

[49547-49548.3](#) *Comprehensive nutrition services*

[49550-49562](#) *Meals for needy students*

[49570](#) *National School Lunch Act*

[51795-51797](#) *School gardens*

**HEALTH AND SAFETY CODE**

[113700-114437](#) *California Retail Food Code*

**CODE OF REGULATIONS, TITLE 5**

[15510](#) *Mandatory meals for needy students*

[15530-15535](#) *Nutrition education*

[15550-15565](#) *School lunch and breakfast programs*

[15575-15578](#) *Requirements for foods and beverages outside federal meal programs*

**UNITED STATES CODE, TITLE 42**

[1751-1769j](#) *National School Lunch Program, including:*

[1758b](#) *Local wellness policy*

[1761](#) *Summer Food Service Program and Seamless Summer Feeding Option*

[1769a](#) *Fresh Fruit and Vegetable Program*

[1771-1793](#) *Child nutrition, especially:*

[1772](#) *Special Milk Program*

[1773](#) *National School Breakfast Program*

**CODE OF FEDERAL REGULATIONS, TITLE 7**

[210.1-210.31](#) *National School Lunch Program*

[215.1-215.18](#) *Special Milk Program*

[220.1-220.21](#) *National School Breakfast Program*

[245.1-245.13](#) *Eligibility for free and reduced-price meals and free milk*

**Management Resources:****CSBA PUBLICATIONS**

*Building Healthy Communities: A School Leader's Guide to Collaboration and Community Engagement, 2009*

*Nutrition Standards for Schools: Implications for Student Wellness, Policy Brief, rev. October 2007*

*Monitoring for Success: Student Wellness Policy Implementation Monitoring Report and Guide, 2007*

*Student Wellness: A Healthy Food and Physical Activity Policy Resource Guide, rev. April 2006*

May 9, 2018

AR 3550(c)

**Business and Noninstructional Operations (continued)***CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS**School Meals Initiative Summary**Healthy Children Ready to Learn, January 2005**CALIFORNIA PROJECT LEAN PUBLICATIONS**Policy in Action: A Guide to Implementing Your Local School Wellness Policy, October 2006**U.S. DEPARTMENT OF AGRICULTURE PUBLICATIONS**School Breakfast Toolkit**Fresh Fruit and Vegetable Program: Handbook for Schools, December 2010**Food Buying Guide for Child Nutrition Programs, December 2007**Civil Rights Compliance and Enforcement - Nutrition Programs and Activities, FNS Instruction 113-1, November 2005**Guidance for School Food Authorities: Developing a School Food Safety Program Based on the Process Approach to HACCP Principles, June 2005**Dietary Guidelines for Americans, 2005***WEB SITES**CSBA: <http://www.csba.org>California Department of Education, Nutrition Services Division: <http://www.cde.ca.gov/ls/nu>California Department of Public Health: <http://www.cdph.ca.gov>California Farm Bureau Federation: <http://www.cfbf.com>California Food Policy Advocates: <http://www.cfpa.net>California Healthy Kids Resource Center: <http://www.californiahealthykids.org>California Project LEAN (Leaders Encouraging Activity and Nutrition): <http://www.californiaprojectlean.org>California School Nutrition Association: <http://www.calsna.org>Centers for Disease Control and Prevention: <http://www.cdc.gov>National Alliance for Nutrition and Activity: <http://www.cspinet.org/nutritionpolicy/nana.html>U.S. Department of Agriculture, Food and Nutrition Service: <http://www.fns.usda.gov/fns>

Policy NATIONAL SCHOOL DISTRICT

# CSBA Sample Board Policy

All Personnel BP 4030(a)

## NONDISCRIMINATION IN EMPLOYMENT

The Governing Board is determined to provide district employees, **interns, volunteers,** and job applicants a safe, positive environment where they are assured of full and equal employment access and opportunities, protection from harassment or intimidation, and freedom from any fear of reprisal or retribution for asserting their employment rights in accordance with law. **This policy shall apply to all district employees and, to the extent required by law, to interns, volunteers, and job applicants.**

*(cf. 1240 - Volunteer Assistance)*

*(cf. 4111/4211/4311 - Recruitment and Selection)*

~~The Board prohibits~~ **No** district employees ~~from discriminating~~ **shall be discriminated** against or ~~harassing~~ **harassed by** any **coworker, supervisor, manager, or other district employee or job applicant person with whom the employee comes in contact in the course of employment,** on the basis of the ~~person's~~ **employee's** actual or perceived race, religious creed, color, national origin, ancestry, age, marital status, pregnancy, physical or mental disability, medical condition, genetic information, military and veteran status, gender, gender identity, gender expression, sex, or sexual orientation, or **his/her** association with a person or group with one or more of these actual or perceived characteristics.

*(cf. 0410 - Nondiscrimination in District Programs and Activities)*

~~The Board also prohibits discrimination against any employee or job applicant~~ **Discrimination in employment based on the characteristics listed above is prohibited in all areas of employment and in all employment-related practices, including the following:**

- 1. Discrimination** in hiring, compensation, terms, conditions, and other privileges of employment
- ~~and the t~~**Taking of any an** adverse employment action, ~~including, but not limited to, such as~~ termination or the denial of employment, promotion, job assignment, or training, ~~against an employee or job applicant based on any of the categories listed above.~~

*(cf. 4151/4251/4351 - Employee Compensation)*

*(cf. 4154/4254/4354 - Health and Welfare Benefits)*

- 3. Harassment** consists of ~~u~~**Unwelcome conduct, whether** verbal, physical, or visual, ~~conduct that is based on any of the prohibited categories of discrimination listed above and that is so severe or pervasive that it as to~~ adversely affects an individual's **employee's** employment opportunities, **or that** has the purpose or effect of unreasonably interfering with the individual's work performance, or ~~creating~~ **creating an intimidating, hostile, or offensive work environment**

BP 4030(b)

**NONDISCRIMINATION IN EMPLOYMENT** (continued)

**4. Actions and practices identified as unlawful or discriminatory pursuant to Government Code 12940 or 2 CCR 11006-11086, such as:**

- a. Prohibited ~~s~~Sex discrimination includes ~~discrimination~~ based on an employee's ~~or job applicant's~~ pregnancy, childbirth, breastfeeding, or any related medical condition **or on an employee's gender, gender expression, or gender identity, including transgender status****

*(cf. 4033 - Lactation Accommodation)*

*(cf. 4119.11/4219.11/4319.11 - Sexual Harassment)*

- b. ~~Prohibited discrimination on the basis of religious creed includes~~ **Religious creed** discrimination based on an employee's ~~or job applicant's~~ religious belief or observance, including his/her religious dress or grooming practices, ~~In accordance with Government Code 12940, prohibited discrimination on the basis of religious creed also includes~~ **or based on** the district's failure or refusal to use reasonable means to accommodate an employee's ~~or job applicant's~~ religious belief, observance, or practice which conflicts with an employment requirement. ~~However, the district shall not accommodate an employee's religious dress practice or religious grooming practice if it requires segregation of the individual from other employees or the public or if it would result in a violation of this policy or any law prohibiting discrimination.~~**

- c. Disability discrimination based on a district requirement for a medical or psychological examination of a job applicant, or an inquiry into whether a job applicant has a mental or physical disability or a medical condition or as to the severity of any such disability or condition, without the showing of a job-related need or business necessity**

*(cf. 4119.41/4219.41/4319.41 - Employees with Infectious Disease)*

- d. Disability discrimination based on the district's failure to make reasonable accommodation for the known physical or mental disability of an employee or to engage in a timely, good faith, interactive process with an employee, to determine effective reasonable accommodations for the employee, when he/she has requested reasonable accommodation for a known physical or mental disability or medical condition**

*(cf. 4032 - Reasonable Accommodation)*

The Board also prohibits retaliation against any district employee ~~or job applicant~~ who opposes any discriminatory employment practice by the district or its employees, agents, or

BP 4030(c)

**NONDISCRIMINATION IN EMPLOYMENT** (continued)

representatives or who complains, testifies, assists, or in any way participates in the district's complaint ~~procedures~~ **process** pursuant to this policy. No employee ~~or job applicant~~ who requests an accommodation for any protected characteristic listed in this policy shall be subjected to any punishment or sanction, regardless of whether the request was granted. (Government Code 12940)

Complaints concerning employment discrimination, harassment, or retaliation shall immediately be investigated in accordance with procedures specified in the accompanying administrative regulation.

Any supervisory or management employee who observes or has knowledge of an incident of prohibited discrimination or harassment shall report the incident to the Superintendent or designated district coordinator as soon as practical after the incident. All other employees are encouraged to report such incidents to their supervisor immediately. The district shall protect any employee who ~~does~~ **reports** such incidents from retaliation.

The Superintendent or designee shall use all appropriate means to reinforce the district's nondiscrimination policy. He/she shall provide training and information to employees about how to recognize harassment, ~~and~~ **discrimination, or other related conduct**, how to respond appropriately, and components of the district's policies and regulations regarding discrimination. The Superintendent or designee shall regularly review the district's employment practices and, as necessary, shall take action to ensure district compliance with the nondiscrimination laws.

**In addition, the Superintendent or designee shall post in a conspicuous place on district premises, the California Department of Fair Employment and Housing publication on workplace discrimination and harassment issued pursuant to 2 CCR 11013.**

Any district employee who engages in prohibited discrimination, harassment, or retaliation or who aids, abets, incites, compels, or coerces another to engage or attempt to engage in such behavior in violation of this policy shall be subject to disciplinary action, up to and including dismissal.

*(cf. 4118 - Dismissal/Suspension/Disciplinary Action)*

*(cf. 4218 - Dismissal/Suspension/Disciplinary Action)*

*Legal Reference:*

EDUCATION CODE

200-262.4 Prohibition of discrimination

CIVIL CODE

51.7 Freedom from violence or intimidation

GOVERNMENT CODE

11135 Unlawful discrimination

*Legal Reference continued: (see next page)*

BP 4030(d)

**NONDISCRIMINATION IN EMPLOYMENT (continued)***Legal Reference: (continued)**11138 Rules and regulations**12900-12996 Fair Employment and Housing Act***PENAL CODE***422.56 Definitions, hate crimes***CODE OF REGULATIONS, TITLE 2****11006-11086 Discrimination in employment****11013 Recordkeeping***11019 Terms, conditions and privileges of employment***11023 Harassment and discrimination prevention and correction****11024 Sexual harassment training and education****CODE OF REGULATIONS, TITLE 5***4900-4965 Nondiscrimination in elementary and secondary education programs***UNITED STATES CODE, TITLE 20***1681-1688 Title IX of the Education Amendments of 1972***UNITED STATES CODE, TITLE 29***621-634 Age Discrimination in Employment Act**794 Section 504 of the Rehabilitation Act of 1973***UNITED STATES CODE, TITLE 42***2000d-2000d-7 Title VI, Civil Rights Act of 1964, as amended**2000e-2000e-17 Title VII, Civil Rights Act of 1964, as amended**2000ff-2000ff-11 Genetic Information Nondiscrimination Act of 2008**2000h-2-2000h-6 Title IX of the Civil Rights Act of 1964**6101-6107 Age discrimination in federally assisted programs**12101-12213 Americans with Disabilities Act***CODE OF FEDERAL REGULATIONS, TITLE 28***35.101-35.190 Americans with Disabilities Act***CODE OF FEDERAL REGULATIONS, TITLE 34***100.6 Compliance information**104.7 Designation of responsible employee for Section 504**104.8 Notice**106.8 Designation of responsible employee and adoption of grievance procedures**106.9 Dissemination of policy**110.1-110.39 Nondiscrimination on the basis of age***COURT DECISIONS***Thompson v. North American Stainless LP, (2011) 131 S.Ct. 863**Shephard v. Loyola Marymount, (2002) 102 Cal.App.4th 837**Management Resources:***CALIFORNIA DEPARTMENT OF FAIR EMPLOYMENT AND HOUSING PUBLICATIONS***California Law Prohibits Workplace Discrimination and Harassment, December 2014***U.S. DEPARTMENT OF EDUCATION, OFFICE FOR CIVIL RIGHTS PUBLICATIONS***Notice of Non-Discrimination, August 2010***U.S. EQUAL EMPLOYMENT OPPORTUNITY COMMISSION PUBLICATIONS***Questions and Answers: Religious Discrimination in the Workplace, 2008**New Compliance Manual Section 15: Race and Color Discrimination, April 2006**Enforcement Guidance: Vicarious Employer Liability for Unlawful Harassment by Supervisors, June 1999***WEB SITES***California Department of Fair Employment and Housing: <http://www.dfeh.ca.gov>**U.S. Department of Education, Office for Civil Rights: <http://www.ed.gov/about/offices/list/ocr>**U.S. Equal Employment Opportunity Commission: <http://www.eeoc.gov>*

# CSBA Sample Administrative Regulation

All Personnel AR 4030(a)

## NONDISCRIMINATION IN EMPLOYMENT

**All allegations of discrimination in employment, including those involving an intern, volunteer, or job applicant, shall be investigated and resolved in accordance with procedures specified in this administrative regulation.**

The district designates the position identified below as its coordinator for nondiscrimination in employment (coordinator) to coordinate the district's efforts to comply with state and federal nondiscrimination laws and to answer inquiries regarding the district's nondiscrimination policies. The coordinator may be contacted at:

Leticia Hernandez, Director of Human Resources  
(Appointed Designee)  
1500 N Avenue, National City CA 91950  
(address)  
619-336-7722  
(phone)  
lhernandez@nsd.us  
(email)

### Measures to Prevent Discrimination

To prevent unlawful discrimination, harassment, and retaliation ~~against district employees, volunteers, interns, and job applicants~~ **in district employment**, the Superintendent or designee shall implement the following measures:

1. Publicize the district's nondiscrimination policy and regulation, including the complaint procedures and the coordinator's contact information, ~~to employees, volunteers, interns, job applicants, and the general public~~ by: (5 CCR 4960; 34 CFR 100.6, 106.9)
  - a. Including them in each announcement, bulletin, or application form that is used in employee recruitment
  - b. Posting them in all district schools and offices, including staff lounges and other prominent locations
  - c. Posting them on the district's web site and providing easy access to them through district-supported social media, when available

*(cf. 1113 - District and School Web Sites)*



AR 4030(b)

**NONDISCRIMINATION IN EMPLOYMENT** (continued)

*(cf. 1114 - District-Sponsored Social Media)*

- 2. Disseminate the district's nondiscrimination policy to all employees by one or more of the following methods: (2 CCR 11023)**
  - a. Printing and providing a copy of the policy to all employees with an acknowledgment form for each employee to sign and return**
  - b. Sending the policy via email with an acknowledgment return form**
  - c. Posting the policy on the district intranet with a tracking system ensuring all employees have read and acknowledged receipt of the policies**
  - d. Discussing district policy with employees upon hire and/or during a new hire orientation session**
  - e. Any other way that ensures employees receive and understand the policy**

*(cf. 4112.9/4212.9/4312.9 - Employee Notifications)*

- 23.** Provide to employees a handbook that contains information that clearly describes the district's nondiscrimination policy, procedures for filing a complaint, and resources available to anyone who feels that he/she has been the victim of any discriminatory or harassing behavior
- 34.** Provide training to employees, volunteers, and interns regarding the district's nondiscrimination policy, including what constitutes unlawful discrimination, harassment, and retaliation and how and to whom a report of an incident should be made

**Training for supervisors shall include the requirement to report any complaint of misconduct to a designated representative, such as the coordinator, human resources manager, or Superintendent or designee as a topic in the sexual harassment prevention training required pursuant to 2 CCR 11024 (2 CCR 11023)**

*(cf. 1240 - Volunteer Assistance)*

*(cf. 4119.11/4219.11/4319.11 - Sexual Harassment)*

*(cf. 4131 - Staff Development)*

*(cf. 4231 - Staff Development)*

*(cf. 4331 - Staff Development)*

- 45.** Periodically review the district's recruitment, hiring, and promotion processes and regularly monitor the terms, conditions, and privileges of employment to ensure district compliance with law

AR 4030(c)

**NONDISCRIMINATION IN EMPLOYMENT** (continued)

- 6. For any district facility where 10 percent of employees have a language other than English as their spoken language, translate the policy into every language spoken by at least 10 percent of the workforce**

**Complaint Procedure**

Any complaint ~~by an employee or job applicant~~ alleging **unlawful** discrimination or harassment shall be addressed in accordance with the following procedures:

1. **Notice and Receipt of Complaint:** A complainant ~~who is an employee shall~~ **may** inform his/her **direct** supervisor, ~~However, if the supervisor is the person against whom the employee is complaining, the employee shall inform, another supervisor, the coordinator, or the Superintendent; or, if available, a complaint hotline or an ombudsman. A job applicant shall inform the coordinator or the Superintendent or designee.~~

The complainant may file a written complaint in accordance with this procedure, or if he/she is an employee, may first attempt to resolve the situation informally with his/her supervisor.

A supervisor or manager who has received information about an incident of discrimination or harassment, or has observed such an incident, shall report it to the coordinator, whether or not the complainant files a written complaint.

The written complaint should contain the complainant's name, the name of the individual who allegedly committed the act, a description of the incident, the date and location where the incident occurred, any witnesses who may have relevant information, other evidence of the discrimination or harassment, and any other pertinent information which may assist in investigating and resolving the complaint.

*(cf. 0410 - Nondiscrimination in District Programs and Activities)*

*(cf. 4032 - Reasonable Accommodation)*

2. **Investigation Process:** The coordinator shall initiate an impartial investigation of an allegation of discrimination or harassment within five business days of receiving notice of the **alleged discriminatory or harassing** behavior, regardless of whether a written complaint has been filed or whether the written complaint is complete.

The coordinator shall meet with the complainant to describe the district's complaint procedure and discuss the actions being sought by the complainant in response to the allegation. The coordinator shall inform the complainant that the ~~allegations~~ **investigation of the allegations will be fair, timely, and thorough and will be conducted in a manner that provides all parties due process and reaches reasonable conclusions based on the evidence collected. He/she shall also inform the parties that the investigation** will be kept confidential to the extent possible, but that some information may be revealed as necessary to conduct an effective investigation.

AR 4030(d)

**NONDISCRIMINATION IN EMPLOYMENT** (continued)

*(cf. 3580 - District Records)*

*(cf. 4112.6/4212.6/4312.6 - Personnel Files)*

*(cf. 4119.23/4219.23/4319.23 - Unauthorized Release of Confidential/Privileged Information)*

If the coordinator determines that a detailed fact-finding investigation is necessary, he/she shall begin the investigation immediately. As part of this investigation, the coordinator should interview the complainant, the person accused, and other persons who could be expected to have relevant information.

**The coordinator shall track and document the progress of the investigation to ensure reasonable progress and shall inform the parties as necessary.**

When necessary to carry out his/her investigation or to protect employee safety, the coordinator may discuss the complaint with the Superintendent or designee, district legal counsel, or the district's risk manager.

The coordinator also shall determine whether interim measures, such as scheduling changes, transfers, or leaves, need to be taken before the investigation is completed to ensure that further incidents ~~do not occur~~ **are prevented**. The coordinator shall ensure that such interim measures do not constitute retaliation.

3. **Written Report on Findings and Remedial/Corrective Action:** No more than 20 business days after receiving the complaint, the coordinator shall conclude the investigation and prepare a written report of his/her findings. This timeline may be extended for good cause. If an extension is needed, the coordinator shall notify the ~~complainant~~ **parties** and explain the reasons for the extension.

The report shall include the decision and the reasons for the decision and shall summarize the steps taken during the investigation. If a determination has been made that discrimination or harassment occurred, the report also shall include any corrective action(s) that have been or will be taken to address the behavior, ~~correct the effect on~~ **provide appropriate options for remedial actions and resolutions for** the complainant, and ensure that retaliation or further discrimination or harassment ~~does not occur~~ **is prevented**.

The report shall be presented to the complainant, the person accused, and the Superintendent or designee.

4. **Appeal to the Governing Board:** The complainant or the person accused may appeal any findings to the Board within 10 business days of receiving the written report of the coordinator's findings. The Superintendent or designee shall provide the Board with all information presented during the investigation. Upon receiving an appeal, the Board shall schedule a hearing as soon as practicable. Any complaint against a district employee shall be addressed in closed session in accordance with law. The Board shall render its decision within 10 business days.

AR 4030(e)

**NONDISCRIMINATION IN EMPLOYMENT** (continued)

*(cf. 1312.1 - Complaints Concerning District Employees)*

*(cf. 9321 - Closed Session Purposes and Agendas)*

**Other Remedies**

In addition to filing a discrimination or harassment complaint with the district, a person may file a complaint with either the California Department of Fair Employment and Housing (DFEH) or the Equal Employment Opportunity Commission (EEOC). The time limits for filing such complaints are as follows:

1. To file a valid complaint with DFEH, within one year of the alleged discriminatory act(s), unless an exception exists pursuant to Government Code 12960
2. To file a valid complaint directly with EEOC, within 180 days of the alleged discriminatory act(s) (42 USC 2000e-5)
3. To file a valid complaint with EEOC after first filing a complaint with DFEH, within 300 days of the alleged discriminatory act(s) or within 30 days after the termination of proceedings by DFEH, whichever is earlier (42 USC 2000e-5)

# CSBA Sample Board Policy

**Certificated Personnel**      BP 4112.2(a)

## **CERTIFICATION**

The Governing Board recognizes that the district's ability to provide a high-quality educational program is dependent upon the employment of certificated staff who are adequately prepared and have demonstrated proficiency in basic skills and in the subject matter to be taught. The Superintendent or designee shall ensure that persons employed to fill positions requiring certification qualifications possess the appropriate credential, permit, or other certification document from the Commission on Teacher Credentialing (CTC) and fulfill any additional state, federal, or district requirements for the position.

*(cf. 4111/4211/4311 - Recruitment and Selection)*

*(cf. 4112.21 - Interns)*

*(cf. 4112.22 - Staff Teaching English Language Learners)*

*(cf. 4112.23 - Special Education Staff)*

~~*(cf. 4112.24 - Teacher Qualifications Under the No Child Left Behind Act)*~~

*(cf. 4112.5/4212.5/4312.5 - Criminal Record Check)*

*(cf. 4113 - Assignment)*

*(cf. 4121 - Temporary/Substitute Personnel)*

*(cf. 5148 - Child Care and Development)*

*(cf. 6178 - Career Technical Education)*

*(cf. 6200 - Adult Education)*

The Superintendent or designee **may shall** provide assistance and support to teachers holding preliminary credentials to **help enable** them **to** meet the qualifications required for the clear credential.

*(cf. 4131 - Staff Development)*

*(cf. 4131.1 - Teacher Support and Guidance)*

## **Priorities for Hiring Based on Unavailability of Credentialed Teacher**

The Superintendent or designee shall make reasonable efforts to recruit a fully prepared teacher for each assignment. Whenever a teacher with a clear or preliminary credential is not available, the Superintendent or designee shall make reasonable efforts to recruit an individual for the assignment in the following order: (Education Code 44225.7)

1. A candidate who **is qualified to participate in and** enrolls in an approved intern program in the region of the district **and possesses an intern credential**

BP 4112.2(b)

**CERTIFICATION** (continued)

2. A candidate who is scheduled to complete preliminary credential requirements within six months and who holds a provisional internship permit (PIP) or short-term staff permit issued by the CTC

The Board shall approve, as an action item at a public Board meeting, a notice of its intent to employ a PIP applicant for a specific position. (5 CCR 80021.1)

3. ~~As a last resort,~~ An individual who holds an emergency permit ~~issued by the CTC~~ or for whom a credential waiver has been granted by the CTC

Prior to requesting that the CTC issue an emergency permit pursuant to item #3 above or a limited assignment permit which allows a fully credentialed teacher to teach outside of his/her area of certification while working toward an added or supplementary authorization, the Board shall annually approve a Declaration of Need for Fully Qualified Educators. The Declaration of Need shall be approved by the Board as an action item at a regularly scheduled public Board meeting, with the entire Declaration of Need being included in the Board agenda. (Education Code 44225, 44225.7; 5 CCR 80023.2, 80026, 80027, 80027.1)

The Declaration of Need shall certify that there is an insufficient number of certificated persons who meet the district's specified employment criteria for the position(s) and that the district has made reasonable efforts to recruit individuals who meet the qualifications specified in items #1-#2 above. The Declaration of Need shall also indicate the number and type of emergency permits that the district estimates it will need during the valid period of the Declaration of Need, based on the previous year's actual needs and projections of enrollment. Whenever the actual number of permits needed exceeds the estimate by 10 percent, the Board shall revise and resubmit the Declaration of Need. (5 CCR 80026)

Whenever it is necessary to employ noncredentialed teachers to fill a position requiring certification qualifications, the Superintendent or designee shall provide support and guidance in accordance with law to ensure the quality of the instructional program.

**National Board for Professional Teaching Standards Certification**

The Board encourages district teachers to voluntarily complete the requirements for the advanced certification awarded by the National Board for Professional Teaching Standards.

The Superintendent or designee shall inform all teachers about the program and how to acquire the necessary application and information materials. In accordance with the collective bargaining agreement and the district budget, the Superintendent or designee may provide release time, fee support, a stipend upon completion, or other support to teachers participating in the program.

*(cf. 4161.3 - Professional Leaves)*

BP 4112.2(c)

**CERTIFICATION (continued)**

**Parental Notifications**

**At the beginning of each school year, the Superintendent or designee shall notify the parents/guardians of each student attending a school receiving Title I funds that they may request information regarding the professional qualifications of their child's classroom teacher including, but not limited to, whether the teacher: (20 USC 6312)**

- 1. Has met state qualification and licensing criteria for the grade levels and subject areas in which the teacher provides instruction**
- 2. Is teaching under emergency or other provisional status through which state qualification or licensing criteria have been waived**
- 3. Is teaching in the field of discipline of his/her certification**

*(cf. 5145.6 - Parental Notifications)*

**In addition, the Superintendent or designee shall notify parents/guardians in a timely manner whenever their child has been assigned, or has been taught for four or more consecutive weeks by, a teacher who does not meet applicable state certification or licensure requirements at the grade level and subject area to which the teacher has been assigned. (20 USC 6312)**

*Legal Reference:*

EDUCATION CODE

8360-8370 *Qualifications of child care personnel*

32340-32341 *Unlawful issuance of a credential*

35186 *Complaints regarding teacher vacancy or misassignment*

44066 *Limitations on certification requirements*

44200-44399.1 *Teacher credentialing, especially:*

44250-44277 *Credential types; minimum requirements*

44300-44302 *Emergency permit*

44325-44328 *District interns*

44330-44355 *Certificates and credentials*

44420-44440 *Revocation and suspension of credentials*

44450-44468 *University intern program*

44830-44929 *Employment of certificated persons; requirement of proficiency in basic skills*

56060-56063 *Substitute teachers in special education*

CODE OF REGULATIONS, TITLE 5

~~6100-6126~~ *Teacher qualifications, No Child Left Behind Act*

80001-80674.6 *Commission on Teacher Credentialing*

UNITED STATES CODE, TITLE 20

**6312 *Title I local educational agency plans; notifications regarding teacher qualifications***

~~6319~~ *Highly qualified teachers*

~~7801~~ *Definitions, highly qualified teacher*

CODE OF FEDERAL REGULATIONS, TITLE 34

200.61 *Parent notification regarding teacher qualifications*

BP 4112.2(d)

**CERTIFICATION** (continued)

~~200.55-200.57 Highly qualified teachers~~

COURT DECISIONS

Association of Mexican-American Educators et al. v. State of California and the Commission on Teacher Credentialing, (1993) 836 F.Supp. 1534

*Management Resources:*

COMMISSION ON TEACHER CREDENTIALING PUBLICATIONS

CL-667 Basic Skills Requirement

CL-856 Provisional Internship Permit

CL 858 Short-Term Staff Permit

13-01 Hiring Hierarchy in Education Code 44225.7, Coded Correspondence, January 30, 2013

Subject Matter Authorization Guideline Book, 2012

Supplementary Authorization Guideline Book, 2012

California Standards for the Teaching Profession, 2009

The Administrator's Assignment Manual, rev. September 2007

WEB SITES

CSBA: <http://www.csba.org>

Commission on Teacher Credentialing: <http://www.ctc.ca.gov>

Commission on Teacher Credentialing, *Credential Information Guide (for employers' use only)*:

<http://www.ctc.ca.gov/credentials/cig>

National Board for Professional Teaching Standards: <http://www.nbpts.org>

U.S. Department of Education: <http://www.ed.gov>



# CSBA Sample Administrative Regulation

**Certificated Personnel** AR 4112.2(a)

## **CERTIFICATION**

### **Verification of Credentials**

The Superintendent or designee shall verify that each employee in a position requiring certification qualifications possesses a valid certification document issued by the Commission on Teacher Credentialing (CTC). Such verification shall occur not later than 60 days after the commencement of employment or the renewal of a credential. (Education Code 44857)

*(cf. 4112.21 - Interns)*  
*(cf. 4112.22 - Staff Teaching English Learners)*  
*(cf. 4112.23 - Special Education Staff)*  
*(cf. 4121 - Temporary/Substitute Personnel)*  
*(cf. 5148 - Child Care and Development)*  
*(cf. 6178 - Career Technical Education)*  
*(cf. 6200 - Adult Education)*

**The Superintendent or designee shall verify that any person who is employed by the district while his/her application for certification is being processed by the CTC possesses a temporary certificate based on a demonstration of basic skills and completion of a criminal background check. (Education Code 44332, 44332.5, 44332.6)**

The Superintendent or designee shall maintain records of the appropriate certification of all employees serving in certificated positions.

*(cf. 3580 - District Records)*  
*(cf. 4112.6/4212.6/4312.6 - Personnel Files)*

### **Basic Skills Proficiency**

The district shall not initially hire a person in a position requiring certification, on a permanent, temporary, or substitute basis, unless that person has demonstrated basic skills proficiency in reading, writing, and mathematics or is specifically exempted from the requirement by law. (Education Code 44252, 44252.6, 44830)

The district may hire a certificated employee who has not taken a test of basic skills proficiency if he/she has not yet been afforded the opportunity to take the test, provided that he/she takes the test at the earliest opportunity. The employee may remain employed by the district pending the receipt of his/her test results. (Education Code 44830)

AR 4112.2(b)

**CERTIFICATION** (continued)

An out-of-state prepared teacher shall meet the basic skills requirement within one year of being issued a California preliminary credential by the CTC unless he/she has completed a basic skills proficiency test in another state or is otherwise exempted by law. The district shall develop a basic skills proficiency test, which shall be at least equivalent to the district test required for high school graduation, for purposes of assessing out-of-state prepared teachers pending completion of the basic skills requirement. (Education Code 44252, 44274.2; 5 CCR 80071.4, 80413.3)

*(cf. 6146.1 - High School Graduation Requirements)*

*(cf. 6146.2 - Certificate of Proficiency)*

*(cf. 6162.5 - High School Exit Examination)*

Any person holding or applying for a "designated subjects special subjects" credential which does not require possession of a bachelor's degree shall pass a district proficiency test in lieu of meeting the state basic skills proficiency requirement. (Education Code 44252, 44830)

The district may charge a fee to cover the costs of developing, administering, and grading the district proficiency test. (Education Code 44252, 44830)

**Short-Term Staff Permit**

The district may request that the CTC issue a short-term staff permit (STSP) to a qualified applicant whenever there is a need to immediately fill a classroom based on unforeseen circumstances, including, but not limited to: (5 CCR 80021)

1. Enrollment adjustments requiring the addition of another teacher
2. Inability of the teacher of record to finish the school year due to approved leave or illness
3. The applicant's need for additional time to complete preservice requirements for enrollment into an approved intern program
4. Inability of the applicant to enroll in an approved intern program due to timelines or lack of space in the program
5. Unavailability of a third-year extension of an intern program or the applicant's withdrawal from an intern program

The Superintendent or designee shall ensure that the applicant possesses a bachelor's or higher degree from a regionally accredited college or university, has met the basic skills proficiency requirement unless exempted by state law or regulations, and has satisfied the coursework/experience requirements specified in 5 CCR 80021 for the multiple subject, single subject, or education specialist STSP as appropriate. (5 CCR 80021)

AR 4112.2(c)

**CERTIFICATION** (continued)

When requesting issuance of an STSP, the Superintendent or designee shall submit to the CTC: (5 CCR 80021)

1. Verification that the district has conducted a local recruitment for the permit being requested
2. Verification that the district has provided the permit holder with orientation to the curriculum and to instruction and classroom management techniques and has assigned a mentor teacher for the term of the permit

*(cf. 4131 - Staff Development)*

*(cf. 4131.1 - Teacher Support and Guidance)*

3. Written justification for the permit signed by the Superintendent or designee

The holder of an STSP may be assigned to provide the same service as a holder of a multiple subject, single subject, or education specialist credential in accordance with the authorizations specified on the permit. (5 CCR 80021)

**Provisional Internship Permit**

Before requesting that the CTC issue a provisional internship permit (PIP), the district shall conduct a diligent search for a suitable credentialed teacher or intern, including, but not be limited to, distributing job announcements, contacting college and university placement centers, and advertising in print or electronic media. (5 CCR 80021.1)

*(cf. 4111/4211/4311 - Recruitment and Selection)*

Whenever a suitable credentialed teacher cannot be found after a diligent search, the Superintendent or designee may request that the CTC issue a PIP to an applicant who possesses a bachelor's or higher degree from a regionally accredited college or university, has met the basic skills proficiency requirement unless exempted by state law or regulations, and has satisfied the coursework/experience requirements specified in 5 CCR 80021.1 for the multiple subject, single subject, or education specialist PIP as appropriate. (5 CCR 80021.1)

When submitting the request for a PIP, the district shall provide verification of all of the following: (5 CCR 80021.1, 80026.5)

1. A diligent search has been conducted for a suitable credentialed teacher or suitable qualified intern as evidenced by documentation of the search.
2. Orientation, guidance, and assistance shall be provided to the permit holder as specified in 5 CCR 80026.5.

AR 4112.2(d)

**CERTIFICATION** (continued)

The orientation shall include, but not be limited to, an overview of the curriculum the permit holder is expected to teach and effective instruction and classroom management techniques at the permit holder's assigned level. The permit holder also shall receive guidance and assistance from an experienced educator who is a certificated district employee or a certificated retiree from a California district or county office of education and who has completed at least three years of full-time classroom teaching experience.

3. The district shall assist the permit holder in developing a personalized plan through a district-selected assessment that would lead to subject-matter competence related to the permit.
4. The district shall assist the permit holder to seek and enroll in subject-matter training, such as workshops or seminars and site-based courses, along with training in test-taking strategies, and shall assist the permit holder in meeting the credential subject-matter competence requirement related to the permit.
5. A notice of intent to employ the applicant in the identified position has been made public.

The district shall submit a copy of the agenda item presented at a public Governing Board meeting which shall state the name of the applicant, the assignment in which the applicant will be employed including the name of the school, subject(s), and grade(s) that he/she will be teaching, and that the applicant will be employed on the basis of a PIP. The district also shall submit a signed statement from the Superintendent or designee that the agenda item was acted upon favorably.

6. The candidate has been apprised of steps to earn a credential and enroll in an intern program.

The holder of a PIP may be assigned to provide the same service as a holder of a multiple subject, single subject, or education specialist credential in accordance with the authorizations specified on the permit. (5 CCR 80021.1)

**Teaching Permit for Statutory Leave**

**Whenever there is an anticipated need for the district to temporarily fill the teaching assignment of a teacher of record who will be on sick leave, differential sick leave, industrial accident or illness leave, pregnancy disability leave, or family care and medical leave under the federal Family and Medical Leave Act or California Family Rights Act, the Superintendent or designee may request that the CTC issue a Teaching Permit for Statutory Leave (TPSL) to a qualified individual who will be serving as the interim teacher of record. Prior to submitting an application to the CTC, the district shall provide the applicant with 45 hours of preparation in the content areas listed in 5 CCR 80022. (5 CCR 80022)**

*(cf. 4161.1 - Personal Illness and Injury Leave)*

*(cf. 4161.11 - Industrial Accident/Illness Leave)*

AR 4112.2(e)

**CERTIFICATION** (continued)

*(cf. 4161.8 - Family Care and Medical Leave)*

**A request for the TPSL shall only be submitted if the district has made reasonable efforts to hire a substitute with a full teaching credential that matches the setting and/or subject for the statutory leave position and no such candidate is available. (5 CCR 80022)**

**The district shall verify to the CTC that it will provide the interim teacher: (5 CCR 80022)**

- 1. An orientation to the assignment before or during the first month of service in the statutory leave assignment**
- 2. An average of two hours of mentoring, support, and/or coaching per week through a system of support coordinated and/or provided by a mentor who possesses a valid life or clear credential that would also authorize service in the statutory leave assignment**
- 3. Lesson plans for the first four weeks of the assignment as well as continued assistance in the development of curriculum, lesson planning, and individualized education programs**

**The holder of the TPSL may serve as the interim teacher of record for up to the full length of the leave(s) during the school year. (5 CCR 80022)**

**The Superintendent or designee shall maintain documentation on the assignment in accordance with 5 CCR 80022. He/she shall annually report data on the use of the TPSL to the County Superintendent of Schools for assignment monitoring pursuant to Education Code 44258.9. (5 CCR 80022)**

*(cf. 4113 - Assignment)*

**The Superintendent or designee may annually request renewal of the TPSL, provided that no substitute with a full teaching credential is available for the assignment. The application for each reissuance shall include verification that the interim teacher has completed an additional 45 hours of preparation and the district is continuing to provide mentoring in accordance with items #2-3 above. (5 CCR 80022)**

**Long-Term Emergency Permits**

As necessary, the Superintendent or designee may request that the CTC issue an emergency resource specialist permit, emergency teacher librarian services permit, emergency crosscultural language and academic development permit, or emergency bilingual authorization permit. (5 CCR 80024.3.1, 80024.6, 80024.7, 80024.8)

The Superintendent or designee shall provide any first-time recipient of an emergency teaching permit with an orientation which, to the extent reasonably feasible, shall occur before he/she begins

AR 4112.2(f)

**CERTIFICATION** (continued)

a teaching assignment. The Superintendent or designee may vary the nature, content, and duration of the orientation to match the amount of training and experience previously completed by the emergency permit teacher. The orientation shall include, but not be limited to, the curriculum the teacher is expected to teach and effective techniques of classroom instruction and classroom management at the assigned grade-level span. The emergency permit holder also shall receive guidance and assistance from an experienced educator who is a certificated district employee or a certificated retiree from a California district or county office of education and who has completed at least three years of full-time classroom teaching experience. (5 CCR 80026.5)

*(cf. 4117.14/4317.14 - Postretirement Employment)*

**Emergency Substitute Teaching Permits**

~~For day to day substitute teaching at any grade level, the district may employ a person with an emergency substitute permit issued by the CTC, whose credential or permit authorizes substitute teaching services,~~ provided that:

1. A person holding an emergency 30-day substitute teaching permit, **STSP, PIP, TPSL**, or any valid teaching or services credential that requires at least a bachelor's degree and completion of the California Basic Educational Skills Test, shall not serve as a substitute for more than 30 days for any one teacher during the school year. He/she shall not serve as a substitute in a special education classroom for more than 20 days for any one teacher during the school year. (5 CCR 80025, 80025.3, 80025.4)
2. A person with an emergency career substitute teaching permit shall not serve as a substitute for more than 60 days for any one teacher during the school year. (5 CCR 80025.1)
3. A person with an emergency substitute teaching permit for prospective teachers shall not serve as a substitute for more than 30 days for any one teacher during the school year and not more than 90 days total during the school year. (5 CCR 80025.2)
4. A person with an emergency designated subjects 30-day substitute teaching permit for career technical education shall teach only in a program of technical, trade, or vocational education and **shall** not serve as a substitute for more than 30 days for any one teacher during the school year. (5 CCR 80025.5)

Before employing a person with an emergency substitute permit pursuant to item #1 or #4 above, the Superintendent or designee shall prepare and keep on file a signed Statement of Need for the school year. The Statement of Need shall describe the situation or circumstances that necessitate the use of a 30-day substitute permit holder and state either that a credentialed person is not available or that the available credentialed person does not meet the district's specified employment criteria. (5 CCR 80025, 80025.5)

Minor Revisions  
May 2016

**BP 4112.21 - Interns**

Delete 6th paragraph to reflect repeal of 20 USC 6319 pursuant to the Every Student Succeeds Act (P.L. 114-95), as follows:

~~An intern may be assigned to teach core academic subjects, as defined in law, if he/she meets the definition of a "highly qualified" teacher adopted by the State Board of Education. (20 USC 6319, 7801; 5 CCR 6100-6112)~~

~~(cf. 4112.24 Teacher Qualifications Under the No Child Left Behind Act)~~

# CSBA Sample Administrative Regulation

Certificated Personnel AR 4112.22(a)

## STAFF TEACHING ENGLISH ~~LANGUAGE~~ LEARNERS

### Definitions

~~English learner means a student who does not speak English or whose native language is not English and who is not currently able to perform ordinary classroom work in English. (Education Code 306)~~

**English learner means a student who is age 3-21 years, who is enrolled or is preparing to enroll in an elementary or secondary school, and whose difficulties in speaking, reading, writing, or understanding the English language may be sufficient to deny the student the ability to meet state academic standards, the ability to successfully achieve in classrooms where the language of instruction is English, or the opportunity to participate fully in society. An English learner may include a student who was not born in the United States or whose native language is a language other than English; a student who is Native American or Alaska Native, or a native resident of the outlying areas, who comes from an environment where a language other than English has had a significant impact on the individual's level of English language proficiency; or a student who is migratory, whose native language is a language other than English, and who comes from an environment where a language other than English is dominant. (Education Code 306; 20 USC 7801)**

*Instruction for English language development (ELD)* means instruction designed specifically for English learners to develop their listening, speaking, reading, and writing skills in English. (Education Code 44253.2)

*Specially designed academic instruction in English (SDAIE)* means instruction in a subject area, delivered in English, that is specially designed to meet the needs of English learners. (Education Code 44253.2)

*Primary language instruction* includes both *primary language development* designed to develop English learners' listening, speaking, reading, and writing skills in their primary language and *content instruction delivered in the primary language* in any subject area. (Education Code 44253.2)

(cf. 6174 - Education for English ~~Language~~ Learners)

### Teacher Qualifications

~~The Superintendent or designee shall ensure that any teacher with one or more English learners in his/her class possesses an English learner authorization issued by the Commission on Teacher Credentialing (CTC) authorizing ELD and/or SDAIE, as appropriate. A teacher possessing a~~



AR 4112.22(b)

**STAFF TEACHING ENGLISH LANGUAGE LEARNERS** (continued)

~~bilingual authorization may be assigned to provide ELD, SDAIE, and/or primary language instruction.~~ **Only a teacher who possesses an appropriate authorization issued by the Commission on Teacher Credentialing (CTC) shall provide ELD, SDAIE, and/or primary language instruction in a class with one or more English learners.**

*(cf. 1312.4 - Williams Uniform Complaint Procedures)*

*(cf. 4112.2 - Certification)*

*(cf. 4112.21 - Interns)*

*(cf. 4113 - Assignment)*

*(cf. 4131 - Staff Development)*

*(cf. 4222 - Teacher Aides/Paraprofessionals)*

~~A teacher with a designated subjects teaching credential or a service credential with a special class authorization may enroll in a CTC approved staff development program and, upon successful completion, may apply to the CTC for a Certificate of Completion of Staff Development authorizing instruction in SDAIE. (Education Code 44253.11)~~

~~*(cf. 4131 - Staff Development)*~~

The **Governing Board district** may, for the purpose of providing primary language instruction, hire bilingual teachers who are employed in public or private schools of a foreign country, state, territory, or possession, provided such teachers speak English fluently and hold the necessary sojourn credential issued by the CTC. After the initial two-year sojourn credential expires, the teacher may annually apply to the CTC for an extension for a total period of not more than five years. Any application for renewal shall include verification by the Superintendent or designee that termination of the employment would adversely affect an existing bilingual program and that attempts to secure the employment of a qualified certificated California teacher have been unsuccessful. (Education Code 44856)

*Legal Reference:*

EDUCATION CODE

306 Definition, English learner

44253.1-44253.11 ~~Certification for bilingual crosscultural competence~~ **Qualifications of teachers of English learners**

44258.9 County superintendent review of teacher assignments

44259.5 Standards for teachers of all students, including English language learners

44380-44386 Alternative certification

44856 Employment of teachers from foreign countries

52160-52178 Bilingual-Bicultural Act of 1976

62001-62005. 5 Evaluation and sunseting of programs

CODE OF REGULATIONS, TITLE 5

80015 Requirements for the CLAD certification or English learner authorization

80015.1-80015.4 Requirements for CLAD, English learner authorization or bilingual authorization

80021 Short-Term Staff Permit

80021.1 Provisional Internship Program

80024.7-80024.8 Emergency CLAD and bilingual permits

AR 4112.22(c)

**STAFF TEACHING ENGLISH LANGUAGE LEARNERS (continued)**UNITED STATES CODE, TITLE 206601-6651 *Training and recruiting high-quality teachers*6801-7014 *Language instruction for English learners and immigrant students***7801 Definition of English learner**COURT DECISIONS*Teresa P. et al v. Berkeley Unified School District et al (1989) 724 F.Supp. 698**Management Resources:*COMMISSION ON TEACHER CREDENTIALING PUBLICATIONS**Administrator's Assignment Manual****Frequently Asked Questions Concerning Appropriate Assignment and Authorizations to Serve English Learners in California**CL-622 *Serving English Learners*, ~~December 2010~~CL-626B *Bilingual Authorizations*, ~~November 2010~~CL-626C *Crosscultural, Language and Academic Development (CLAD) Certificate*, ~~November 2010~~CL-568 *The Sojourn Certificated Employee Credential*, ~~August 2009~~**CL-824 Certificate of Completion of Staff Development**WEB SITESCSBA: <http://www.csba.org>California Association for Bilingual Education: ~~<http://www.bilingualeducation.org>~~ <http://www.gocabe.org>California Department of Education, English Learners: <http://www.cde.ca.gov/sp/el>California Teachers of English to Speakers of Other Languages: <http://www.catesol.org>Commission on Teacher Credentialing: <http://www.ctc.ca.gov>U.S. Department of Education: <http://www.ed.gov>

**Minor Revisions**  
**May 2016**

**AR 4112.23 - Special Education Staff**

Delete 2nd paragraph to reflect repeal of 20 USC 6319 pursuant to the Every Student Succeeds Act (P.L. 114-95), as follows:

~~Special education teachers who teach core academic subjects shall possess the qualifications required by the No Child Left Behind Act. (5 CCR 6100-6126; 20 USC 1401, 6319, 7801; 34 CFR 200.55-200.57, 300.18)~~

~~(cf. 4112.24 Teacher Qualifications Under the No Child Left Behind Act)~~

# CSBA Sample Administrative Regulation

All Personnel AR 4112.61(a)/4212.61/4312.61

## EMPLOYMENT REFERENCES

The Superintendent or designee shall ~~process~~ **be responsible for processing** requests for employment references, letters of recommendation, or information about the reasons for separation regarding all district employees other than himself/herself. All letters of recommendation to be issued on behalf of the district for current or former employees shall be approved by the Superintendent or designee. At his/her discretion, the Superintendent or designee may refuse to give a recommendation.

**The Superintendent or designee may communicate information about the job performance or qualifications of a current or former district employee when such information is based upon credible evidence and is given to a prospective employer without malice and at the prospective employer's request. (Civil Code 47)**

**Any reference, letter of recommendation, or information provided about the reasons for separation issued on behalf of the district** ~~he/she gives~~ shall provide a ~~careful, truthful, and complete~~ **accurate** account of the employee's job performance and qualifications.

*(cf. 4112.6/4212.6/4312.6 - Personnel Files)*

*(cf. 4117.5/4217.5/4317.5 - Termination Agreements)*

No certificated employee shall write or sign any letter or memorandum which intentionally omits significant facts, or which states as facts matters which the writer does not know of his/her own knowledge to be true, relating to the professional qualifications or personal fitness to perform certificated services of any person who the writer knows will use the letter or memorandum to obtain professional employment. (5 CCR 80332)

No certificated employee shall agree to provide a positive letter of recommendation which misrepresents facts as a condition of another employee's resigning or withdrawing action against the district. (5 CCR 80332)

### *Legal Reference:*

#### **LABOR CODE**

*1050-1054 Reemployment privileges*

#### **CIVIL CODE**

*47 Privileged communication*

#### **CODE OF CIVIL PROCEDURE**

*527.3 Labor disputes*

#### **CODE OF REGULATIONS, TITLE 5**

*80332 Professional candor and honesty in letters or memoranda of employment recommendation*

#### **COURT DECISIONS**

*Randi W. v. Muroc Joint Unified School District et al., (1997) 14 Cal. 4th 1066*

# CSBA Sample Board Policy

**Certificated Personnel**      BP 4113(a)

## ASSIGNMENT

In order to serve the best interests of students and the educational program, the Governing Board authorizes the Superintendent or designee to assign certificated personnel to positions for which their preparation, certification, professional experience, and aptitude qualify them.

*(cf. 4112.2 - Certification)*

*(cf. 4112.21 - Interns)*

*(cf. 4112.22 - Staff Teaching English Language Learners)*

*(cf. 4112.23 - Special Education Staff)*

*(cf. 4112.8/4212.8/4312.8 - Employment of Relatives)*

Teachers may be assigned to any school within the district in accordance with the collective bargaining agreement or Board policy.

*(cf. 4141/4241 - Collective Bargaining Agreement)*

## Assignment to Courses/Classes

The Superintendent or designee shall assign teachers to courses based on the grade level and subject matter authorized by their credentials.

When there is no credential authorization requirement for teaching an elective course, the Superintendent or designee shall select the credentialed teacher whose knowledge and skills best prepare him/her to provide instruction in that subject.

**When specifically authorized by law or regulation,** the Superintendent or designee may assign a teacher, with his/her consent, to a position outside his/her credential authorization **when specifically authorized by law or regulation, and** in accordance with the local teaching assignment options described in the Commission on Teacher Credentialing's **(CTC) Administrator's Assignment Manual**. Assignments made pursuant to Education Code 44256, 44258.2, and 44263 shall be annually approved by Board resolution. In such cases, the Superintendent or designee shall reference in district records the statute or regulation under which the assignment is authorized.

*(cf. 3580 - District Records)*

The Superintendent or designee shall periodically report to the Board on teacher assignments and vacancies, including the number and type of assignments made outside a teacher's credential authorization through a local teaching assignment option. Whenever district misassignments and vacancies are reviewed by the County Superintendent of Schools or **Commission on Teacher**

BP 4113(b)

**ASSIGNMENT** (continued)

**Credentialing CTC**, as applicable, the Superintendent or designee shall report the results to the Board and shall provide recommendations for remedying any identified issues.

*(cf. 1312.4 - Williams Uniform Complaint Procedures)*

**Equitable Distribution of Qualified Teachers**

~~In order to~~ **The Superintendent or designee shall** ensure that highly qualified and experienced teachers are equitably distributed among district schools, including those with higher than average levels of low-income, minority, and/or academically underperforming students. ~~the Superintendent or designee shall.~~ He/she shall annually report to the Board **and the California Department of Education (CDE)** comparisons of teacher qualifications across district schools, **including the number of teachers serving under a provisional internship permit, short-term staff permit, intern credential, emergency permit, or credential waiver.**

*(cf. 0520.2 - Title I Program Improvement Schools)*

**Strategies for ensuring equitable access to experienced teachers may include, but are not limited to, incentives for voluntary transfers, provision of professional development, and/or programs to recruit and retain effective teachers.**

*(cf. 0460 - Local Control and Accountability Plan)*

*(cf. 4111 - Recruitment and Selection)*

*(cf. 4114 - Transfers)*

*(cf. 4131 - Staff Development)*

*(cf. 4131.1 - ~~Beginning Teacher Support/Induction~~ **Teacher Support and Guidance**)*

*(cf. 6171 - Title I Programs)*

1. ~~Verify that all teachers of core academic subjects possess the qualifications of highly qualified teachers as required by NCLB or develop immediate and long-term solutions for ensuring that all core academic classes will be taught by highly qualified teachers~~
2. ~~Not assign teachers with provisional internship permits, short term staffing permits, or credential waivers to schools that have 40 percent or higher poverty or are ranked in deciles 1-3 on the statewide Academic Performance Index~~
3. ~~Not place interns in high poverty, low performing schools in greater numbers than in schools with low poverty or higher academic achievement~~
4. ~~Compare teacher retention rates across district schools and develop strategies to recruit and retain experienced and effective teachers in hard to staff schools~~

BP 4113(c)

**ASSIGNMENT** (continued)

The Superintendent or designee shall annually report to the Board and the California Department of Education (CDE) comparisons of teacher qualifications across district schools. When required by the CDE, the Superintendent or designee shall develop an equitable distribution plan to identify strategies for recruiting, developing, and retaining highly qualified teachers in low performing schools. As needed, the Board may direct the Superintendent to transfer teachers to high need schools in accordance with law and the collective bargaining agreement, and/or may align district resources to improve the skills and qualifications of teachers at those schools.

*Legal Reference:*EDUCATION CODE

33126 School accountability report card  
 35035 Additional powers and duties of superintendent  
 35186 Complaint process  
 37616 Assignment of teachers to year-round schools  
 44225.6 Commission report to the legislature re: teachers  
 44250-44277 Credentials and assignments of teachers  
 44314 Subject matter programs, approved subjects  
 44824 Assignment of teachers to weekend classes  
 44955 Reduction in number of employees

GOVERNMENT CODE

3543.2 Scope of representation

CODE OF REGULATIONS, TITLE 5

~~6100-6126 Teacher qualifications, No Child Left Behind Act~~  
 80003-80005 Credential authorizations  
 80020-80020.5 Additional assignment authorizations  
 80335 Performance of unauthorized professional services  
 80339-80339.6 Unauthorized certificated employee assignment

UNITED STATES CODE, TITLE 20

6311 State plan

**6312 Local educational agency plans**

~~6319 Highly qualified teachers~~

6601-6651 Teacher and Principal Training and Recruiting Fund

~~7801 Definitions, highly qualified teacher~~

CODE OF FEDERAL REGULATIONS, TITLE 34

~~200.55-200.57 Highly qualified teachers~~

*Management Resources:*CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS

**California State Plan to Ensure Equitable Access to Excellent Educators**

~~Revised State Plan for the No Child Left Behind Act, rev. September 2008~~

**Every Student Succeeds Act 2016-17 School Year Transition Plan, April 2016**

COMMISSION ON TEACHER CREDENTIALING PUBLICATIONS

**Administrator's Assignment Manual - Updates and Revisions, May 2014**

~~The Administrator's Assignment Manual, rev. September 2007~~

U.S. DEPARTMENT OF EDUCATION GUIDANCE

**Transitioning to the Every Student Succeeds Act (ESSA): Frequently Asked Questions, May 4, 2016**

~~Improving Teacher Quality State Grants: ESEA Title II, Part A, rev. October 5, 2006~~

WEB SITES

BP 4113(d)

**ASSIGNMENT** (continued)

*CSBA: <http://www.csba.org>*

*California Department of Education: <http://www.cde.ca.gov>*

*Commission on Teacher Credentialing: <http://www.ctc.ca.gov>*

*~~Santa Clara County Office of Education, Personnel Management Assistance Team:~~*

*~~<http://www.sccoe.org/depts/pmat>~~*

*U.S. Department of Education: <http://www.ed.gov>*



# CSBA Sample Administrative Regulation

**Certificated Personnel** AR 4115(a)

## EVALUATION/SUPERVISION

Evaluation of certificated employees shall be conducted in accordance with the procedures established in this administrative regulation and applicable collective bargaining agreements. To the extent that any of those provisions conflict, the procedures in the collective bargaining agreement shall be implemented.

*(cf. 4141/4241 - Collective Bargaining Agreement)*

The Superintendent or designee shall print and make available to certificated employees written regulations related to the evaluation of their performance in their assigned duties. (Education Code 35171)

*(cf. 4112.9 - Employee Notifications)*

## Frequency of Evaluations

Each probationary certificated employee shall be evaluated at least once each school year. (Education Code 44664)

*(cf. 4116 - Probationary/Permanent Status)  
(cf. 4117.6 - Decision Not to Rehire)*

Each certificated employee with permanent status shall be evaluated and assessed at least every other year. If the employee receives an unsatisfactory evaluation, he/she shall be annually evaluated until he/she achieves a positive evaluation or is separated from the district. (Education Code 44664)

*(cf. 4118 - Dismissal/Suspension/Disciplinary Action)*

Alternatively, ~~if the evaluator and employee agree, a permanent employee shall be evaluated at least every five years provided he/she~~ **a permanent employee who** has been employed by the district at least 10 years; **and who** was rated in his/her previous evaluation as meeting or exceeding standards **shall be evaluated at least every five years, if he/she and the evaluator so agree.** ~~and meets the qualifications of a highly qualified teacher as defined in 20 USC 7801, if his/her position requires such qualifications.~~ Either the evaluator or the employee may withdraw consent for the alternative schedule at any time. (Education Code 44664)

~~*(cf. 4112.24 - Teacher Qualifications Under the No Child Left Behind Act)*~~

AR 4115(b)

## **EVALUATION/SUPERVISION (continued)**

### **Evaluation Results**

Certificated instructional employees shall receive a written copy of their evaluation no later than 30 days before the last scheduled school day of the school year in which the evaluation takes place. Before the last scheduled school day of the school year, the employee and the evaluator shall meet to discuss the evaluation. (Education Code 44663)

Noninstructional certificated staff members employed on a 12-month basis shall receive a copy of their evaluation no later than June 30 of the year in which the evaluation takes place. Before July 30, the employee and the evaluator shall meet to discuss the evaluation. (Education Code 44663)

Instructional and noninstructional certificated employees shall have the right to respond in writing to their evaluation. This response shall become a permanent attachment to the employee's personnel file. (Education Code 44663)

*(cf. 4112.6/4212.6/4312.6 - Personnel Files)*

Evaluations shall include recommendations, if necessary, as to areas in need of improvement in the employee's performance. If an employee is not performing satisfactorily according to teaching standards approved by the Governing Board pursuant to Education Code 44662, the Superintendent or designee shall so notify the employee in writing and shall describe the unsatisfactory performance. The Superintendent or designee shall confer with the employee, make specific recommendations as to areas needing improvement, and endeavor to provide assistance to the employee in his/her performance. (Education Code 44664)

The Superintendent or designee may require any certificated employee who receives an unsatisfactory rating in the area of teaching methods or instruction to participate in a program designed to improve appropriate areas of performance and to further student achievement and the district's instructional objectives. (Education Code 44664)

*(cf. 4131 - Staff Development)*

*(cf. 4131.1 - Teacher Support and Guidance)*

### **Qualifications of Evaluators**

The Superintendent or designee shall assign the principal or other appropriate supervisory personnel to evaluate certificated staff. He/she shall ensure that the evaluator:

1. Possesses a valid administrative credential
2. Is competent in the instructional methodologies used by the teachers being evaluated

AR 4115(c)

**EVALUATION/SUPERVISION** (continued)

3. Is skilled in the supervision of instruction and in techniques and procedures related to the evaluation of instruction
4. Is familiar with district curriculum priorities and practices, district standards for student progress, and district policies and procedures related to personnel supervision, performance evaluation, and staff development

# CSBA Sample Board Policy

All Personnel BP 4119.11(a)/4219.11/4319.11

## SEXUAL HARASSMENT

The Governing Board prohibits sexual harassment of district employees ~~and job applicants~~. The Board also prohibits retaliatory behavior or action against district employees or other persons who complain, testify, or otherwise participate in the complaint process established pursuant to this policy and ~~accompanying~~ administrative regulation. **This policy shall apply to all district employees and, when applicable, to interns, volunteers, and job applicants.**

*(cf. 0410 - Nondiscrimination in District Programs and Activities)*

*(cf. 4030 - Nondiscrimination in Employment)*

The Superintendent or designee shall take all actions necessary to ensure the prevention, investigation, and correction of sexual harassment, including but not limited to:

1. Providing training to employees in accordance with law and administrative regulation
2. Publicizing and disseminating the district's sexual harassment policy to staff

*(cf. 4112.9/4212.9/4312.9 - Employee Notifications)*

3. Ensuring prompt, thorough, and fair investigation of complaints
4. Taking timely and appropriate corrective/remedial action(s), which may require interim separation of the complainant and the alleged harasser and subsequent monitoring of developments

All complaints and allegations of sexual harassment shall be kept confidential to the extent necessary to carry out the investigation or to take other subsequent necessary actions. (~~5 CCR 4964-2 CCR 11023~~)

Note: ~~Because an employee's (especially a supervisor's) knowledge or notice of sexual harassment may subject the district to liability, it is recommended that the district require its employees with knowledge or notice of sexual harassment to report the harassment to the appropriate authorities. Pursuant to 2 CCR~~

Any district employee ~~or job applicant~~ who feels that he/she has been sexually harassed or who has knowledge of any incident of sexual harassment by or against another employee, ~~a job applicant or a student~~, shall immediately report the incident to his/her supervisor, the principal, district administrator, or Superintendent.

A supervisor, principal, or other district administrator who receives a harassment complaint shall promptly notify the Superintendent or designee.

BP 4119.11(b)  
4219.11  
4319.11

## SEXUAL HARASSMENT (continued)

Complaints of sexual harassment shall be filed in accordance with AR 4030 - Nondiscrimination in Employment. An employee may bypass his/her supervisor in filing a complaint where the supervisor is the subject of the complaint.

Any district employee who engages or participates in sexual harassment or who aids, abets, incites, compels, or coerces another to commit sexual harassment **against a district employee, job applicant, or student is** in violation of this policy **and** is subject to disciplinary action, up to and including dismissal.

(cf. 4118 - Dismissal/Suspension/Disciplinary Action)

(cf. 4218 - Dismissal/Suspension/Disciplinary Action)

### Legal Reference:

#### EDUCATION CODE

200-262.4 Prohibition of discrimination on the basis of sex

#### GOVERNMENT CODE

12900-12996 Fair Employment and Housing Act, especially:

12940 Prohibited discrimination

12950.1 Sexual harassment training

#### LABOR CODE

1101 Political activities of employees

1102.1 Discrimination: sexual orientation

#### CODE OF REGULATIONS, TITLE 2

~~7287.8 Retaliation~~

~~7288.0 Sexual harassment training and education~~

**11009 Employment discrimination**

**11021 Retaliation**

**11023 Harassment and discrimination prevention and correction**

**11024 Sexual harassment training and education**

**11034 Terms, conditions, and privileges of employment**

#### CODE OF REGULATIONS, TITLE 5

4900-4965 Nondiscrimination in elementary and secondary education programs receiving state financial assistance

#### UNITED STATES CODE, TITLE 42

2000d-2000d-7 Title VI, Civil Rights Act of 1964

2000e-2000e-17 Title VII, Civil Rights Act of 1964, as amended

2000h-2-2000h-6 Title IX, 1972 Education Act Amendments

#### CODE OF FEDERAL REGULATIONS, TITLE 34

106.9 Dissemination of policy

#### COURT DECISIONS

Department of Health Services v. Superior Court of California, (2003) 31 Cal.4<sup>th</sup> 1026

Faragher v. City of Boca Raton, (1998) 118 S.Ct. 2275

Burlington Industries v. Ellreth, (1998) 118 S.Ct. 2257

Gebser v. Lago Vista Independent School District, (1998) 118 S.Ct. 1989

Oncale v. Sundowner Offshore Serv. Inc., (1998) 118 S.Ct. 998

Meritor Savings Bank, FSB v. Vinson et al., (1986) 447 U.S. 57

BP 4119.11(c)  
4219.11  
4319.11

**SEXUAL HARASSMENT** (continued)

*Management Resources:*

OFFICE OF CIVIL RIGHTS AND NATIONAL ASSOCIATION OF ATTORNEYS GENERAL

Protecting Students from Harassment and Hate Crime, January, 1999

WEB SITES

California Department of Fair Employment and Housing: <http://www.dfeh.ca.gov>

Equal Employment Opportunity Commission: <http://www.eeoc.gov>

U.S. Department of Education, Office for Civil Rights: <http://www.ed.gov/about/offices/list/ocr/index.html>

# CSBA Sample Administrative Regulation

All Personnel AR 4119.11(a)/4219.11/4319.11

## SEXUAL HARASSMENT

**This administrative regulation shall apply to all allegations of sexual harassment involving employees, interns, volunteers, and job applicants, but shall not be used to resolve any complaint by or against a student.**

### Definitions

*Prohibited sexual harassment* includes, but is not limited to, unwelcome sexual advances, unwanted requests for sexual favors, or other unwanted verbal, visual, or physical conduct of a sexual nature made against another person of the same or opposite sex in the work or educational setting when: (Education Code 212.5; Government Code 12940; ~~5 CCR 4916~~ **2 CCR 11034**)

1. Submission to the conduct is made explicitly or implicitly a term or condition of the individual's employment.
2. Submission to or rejection of ~~such the~~ conduct ~~by the individual~~ is used as the basis for an employment decision affecting ~~him/her~~ **the individual**.
- 4.3.** Submission to or rejection of the conduct ~~by the other individual~~ is used as the basis for any decision affecting ~~him/her~~ **the individual** regarding benefits, services, honors, programs, or activities available at or through the district.
- ~~3.~~ **The conduct has the purpose or effect of having a negative impact upon the individual's work or has the purpose or effect of creating an intimidating, hostile, or offensive work environment. Regardless of whether or not the alleged harasser was motivated by sexual desire, the conduct is sufficiently severe, persistent, pervasive, or objectively offensive as to create a hostile or abusive working environment or to limit the individual's ability to participate in or benefit from an education program or activity. Prohibited sexual harassment also includes conduct which, regardless of whether or not it is motivated by sexual desire, is so severe or pervasive as to unreasonably interfere with the victim's work performance or create an intimidating, hostile, or offensive work environment.**

~~Other e~~**E**xamples of actions that might constitute sexual harassment **in the work or educational setting**, whether committed by a supervisor, a co-worker, or a non-employee, ~~in the work or educational setting~~ include, but are not limited to:

1. Unwelcome verbal conduct such as sexual flirtations or propositions; graphic comments about an individual's body; overly personal conversations or pressure for sexual activity; sexual jokes or

AR 4119.11(b)  
4219.11  
4319.11

### SEXUAL HARASSMENT (continued)

stories; unwelcome sexual slurs, epithets, threats, innuendoes, derogatory comments, sexually degrading descriptions, or the spreading of sexual rumors

2. Unwelcome visual conduct such as drawings, pictures, graffiti, or gestures; sexually explicit emails; displaying sexually suggestive objects
3. Unwelcome physical conduct such as massaging, grabbing, fondling, stroking, or brushing the body; touching an individual's body or clothes in a sexual way; cornering, blocking, leaning over, or impeding normal movements

### Training

The Superintendent or designee shall ensure that all employees receive training regarding the district's sexual harassment policies when hired and periodically thereafter. ~~Such~~ **The** training shall include the procedures for reporting and/or filing complaints involving an employee, employees' duty to use the district's complaint procedures, and employee obligations when a sexual harassment report involving a student is made to the employee.

*(cf. 1312.3 - Uniform Complaint Procedures)*

*(cf. 4030 - Nondiscrimination in Employment)*

*(cf. 5145.7 - Sexual Harassment)*

Every two years, the Superintendent or designee shall ensure that supervisory employees receive at least two hours of classroom or other effective interactive training and education regarding sexual harassment. All such newly hired or promoted employees shall receive training within six months of their assumption of the new position. (Government Code 12950.1)

A *supervisory employee* is any employee ~~with~~ **having** the authority, **in the interest of the district,** to hire, transfer, suspend, lay off, promote, discharge, assign, reward, or discipline other employees, **or the responsibility to direct them, adjust their grievances,** or ~~to~~ effectively recommend such action, **when the exercise of the authority is not of a merely routine or clerical nature, but requires the use of independent judgment. (Government Code 12926)**

*(cf. 4300 - Administrative and Supervisory Personnel)*

The district's sexual harassment training and education program for supervisory employees shall ~~include the provision of~~ **be aimed at assisting them in preventing and effectively responding to incidents of sexual harassment, as well as implementing mechanisms to promptly address and correct wrongful behavior. The training shall include, but is not limited to, the following:** (Government Code 12950.1; 2 CCR ~~402311024~~)



AR 4119.11(c)  
4219.11  
4319.11

### SEXUAL HARASSMENT (continued)

1. Information and practical guidance regarding federal and state laws on the prohibition, **against and the prevention,** and correction of sexual harassment, **and the remedies available to the victims of sexual harassment victims in employment civil actions, and potential district and/or individual exposure or liability**
2. **Practical examples aimed at instructing supervisors in the prevention of harassment, discrimination, and retaliation. The types of conduct that constitute sexual harassment and practical examples which illustrate sexual harassment, discrimination, and retaliation using training modalities such as role plays, case studies, and group discussions, based on factual scenarios taken from case law, news and media accounts, and hypotheticals based on workplace situations and other sources**
- ~~3. A component on the prevention of abusive conduct that addresses the use of derogatory remarks, insults, or epithets, other verbal or physical conduct that a reasonable person would find threatening, intimidating, or humiliating, and the gratuitous sabotage or undermining of a person's work performance~~
3. **A supervisor's obligation to report sexual harassment, discrimination, and retaliation of which he/she becomes aware and what to do if the supervisor himself/herself is personally accused of harassment**
4. **Strategies for preventing harassment, discrimination, and retaliation and appropriate steps to ensure that remedial measures are taken to correct harassing behavior, including an effective process for investigation of a complaint**
5. **The essential elements of the district's anti-harassment policy, including the limited confidentiality of the complaint process and resources for victims of unlawful sexual harassment, such as to whom they should report any alleged sexual harassment, and how to use the policy if a harassment complaint is filed**
- 4.6. A copy of the district's sexual harassment policy and administrative regulation, which each participant shall acknowledge in writing that he/she has received
- 3.7. ~~A component on t~~**The definition and** prevention of abusive conduct that addresses the use of derogatory remarks, insults, or epithets, other verbal or physical conduct that a reasonable person would find threatening, intimidating, or humiliating, and the gratuitous sabotage or undermining of a person's work performance
5. ~~All other contents of mandated training specified in 2 CCR 11023~~

AR 4119.11(d)  
 4219.11  
 4319.11

### **SEXUAL HARASSMENT** (continued)

The Superintendent or designee shall retain for at least two years the records of any training provided to supervisory employees. Such records shall include the names of trained employees, date of the training, the type of training, and the name of the training provider. (2 CCR **11023 11024**)

#### **Notifications**

A copy of the Board policy and this administrative regulation shall: (Education Code 231.5)

1. Be displayed in a prominent location in the main administrative building, district office, or other area of the school where notices of district rules, regulations, procedures, and standards of conduct are posted
2. Be provided to every district employee at the beginning of the first quarter or semester of the school year or whenever a new employee is hired

*(cf. 4112.9/4212.9/4312.9 - Employee Notifications)*

3. Appear in any school or district publication that sets forth the school's or district's comprehensive rules, regulations, procedures, and standards of conduct

All employees shall receive either a copy of information sheets prepared by the California Department of Fair Employment and Housing (DFEH) or a copy of district information sheets that contain, at a minimum, components on: (Government Code 12950)

1. The illegality of sexual harassment
2. The definition of sexual harassment under applicable state and federal law
3. A description of sexual harassment, with examples
4. The district's complaint process available to the employee
5. The legal remedies and complaint process available through DFEH and the Equal Employment Opportunity Commission (EEOC)
6. Directions on how to contact DFEH and the EEOC
7. The protection against retaliation provided by 2 CCR 11021 for opposing harassment prohibited by law or for filing a complaint with or otherwise participating in an investigation, proceeding, or hearing conducted by DFEH and the EEOC

AR 4119.11(e)  
4219.11  
4319.11

**SEXUAL HARASSMENT** (continued)

In addition, the district shall post, in a prominent and accessible location, DFEH's poster on discrimination in employment and the illegality of sexual harassment. (Government Code 12950).

# CSBA Sample Board Policy

**Certificated Personnel**      BP 4121(a)

## **TEMPORARY/SUBSTITUTE PERSONNEL**

The Governing Board recognizes that substitute and temporary personnel perform an essential role in promoting student achievement and desires to employ highly qualified, appropriately credentialed employees to fill such positions.

*(cf. 4112.2 - Certification)*

### **Hiring**

The Superintendent or designee shall recommend candidates for substitute or temporary positions for Board approval, and shall ensure that all substitute and temporary employees are assigned in accordance with law and the authorizations specified in their credential.

*(cf. 4113 - Assignment)*

Substitute personnel may be employed on an on-call, day-to-day basis.

In addition, after September 1 of any school year, the Board may employ substitute personnel for the remainder of the school year for positions for which no regular employee is available. The district shall first demonstrate to the Commission on Teacher Credentialing the inability to acquire the services of a qualified regular employee. (Education Code 44917)

*(cf. 4117.14/4317.14 - Postretirement Employment)*

Permanent or probationary certificated employees who were laid off pursuant to Education Code 44955 and who have a preferred right of reappointment shall be given priority for substitute service in the order of their original employment. (Education Code 44956, 44957)

*(cf. 4117.3 - Personnel Reduction)*

### **Classification**

At the time of initial employment and each July thereafter, the Board shall classify substitute and temporary employees as such. (Education Code 44915, 44916)

The Board may classify as substitute personnel a teacher hired to fill the position of a regularly employed person who is absent from service. (Education Code 44917)

To address the need for additional certificated employees when regular district employees are absent due to leaves or long-term illness, the Board may classify a teacher who is employed for at

BP 4121(b)

**TEMPORARY/SUBSTITUTE PERSONNEL** (continued)

least one semester and up to one complete school year as a temporary employee. Any person whose service begins in the second semester and before March 15 may be classified as a temporary employee even if employed for less than a semester. The Board shall determine the number of persons who shall be so employed, which shall not exceed the identified need based on the absence of regular employees. (Education Code 44920)

The Board also shall classify as temporary employees those certificated persons, other than substitute employees, who are employed to:

1. Serve from day to day during the first three months of any school term to teach temporary classes which shall not exist after that time, or perform any other duties which do not last longer than the first three months of any school term (Education Code 44919)
2. Teach in special day and evening classes for adults or in schools of migratory population for not more than four months of any school term (Education Code 44919)

*(cf. 6175 - Migrant Education Program)*  
*(cf. 6200 - Adult Education)*

3. Serve in a limited assignment supervising student athletic activities provided such assignments have first been made available to teachers presently employed in the district (Education Code 44919)

*(cf. 4127/4227/4327 - Temporary Athletic Team Coaches)*

4. Serve in a position for a period not to exceed 20 working days in order to prevent the stoppage of district business during an emergency when persons are not immediately available for probationary classification (Education Code 44919)
5. Serve only for the first semester because the district expects a reduction in student enrollment during the second semester due to mid-year graduations (Education Code 44921)

For purposes of classifying employees pursuant to item #1 or #2 above, the school year shall not be divided into more than two school terms. (Education Code 44919)

Any employee hired to provide services in a categorically funded program or project may be employed for a period less than a full school year. He/she may be classified as a temporary employee if the period of employment will end at the expiration of that program or project. (Education Code 44909)

BP 4121(c)

**TEMPORARY/SUBSTITUTE PERSONNEL** (continued)

**Salary and Benefits**

The Board shall adopt and make public a salary schedule setting the daily or pay period rate(s) for substitute employees for all categories or classes of certificated employees of the district. (Education Code 44977, 45030)

**OPTION 1:** ~~Temporary employees shall participate in the health and welfare plans or other fringe benefits of the district.~~

*(cf. 4140/4240/4340 - Bargaining Units)*  
*(cf. 4154/4254/4354 - Health and Welfare Benefits)*

**OPTION 2:** ~~Temporary employees shall not participate in the health and welfare plans or other fringe benefits of the district.~~

**Paid Sick Leave**

**OPTION 1:** ~~Except for a retired annuitant who is not reinstated to the retirement system, any temporary or substitute employee who works for 30 or more days within a year of his/her employment shall be entitled to one hour of paid sick leave for every 30 hours worked. Accrued paid sick days shall carry over to the following year of employment, up to a maximum of 48 hours. (Labor Code 246)~~

~~**OPTION 2:** Except for a retired annuitant who is not reinstated to the retirement system, any temporary or substitute employee who works for 30 or more days within a year of his/her employment shall accrue, on a regular basis, paid sick leave of up to 24 hours by the 120th calendar day of his/her employment or each calendar year or 12-month period. Accrued paid sick days shall carry over to the following year of employment, up to a maximum of 48 hours. (Labor Code 246)~~

~~**OPTION 3:** Except for a retired annuitant who is not reinstated to the retirement system, any temporary or substitute employee who works for 30 or more days within a year of his/her employment shall be credited with 24 hours of paid sick leave for that year. Unused sick leave shall not carry over to the following year of employment. (Labor Code 246)~~

Any temporary or substitute employee may begin to use accrued paid sick days on the 90th day of his/her employment, after which he/she may use the sick days as they are accrued. (Labor Code 246)

A temporary or substitute employee may use accrued sick leave for absences due to: (Labor Code 246.5)

1. His/her own need or the need of a family member, as defined in Labor Code 245.5, for the diagnosis, care, or treatment of an existing health condition or for preventive care

BP 4121(c)

**TEMPORARY/SUBSTITUTE PERSONNEL** (continued)

2. Need of the employee to obtain or seek any relief or medical attention specified in Labor Code 230(c) and 230.1(a) for the health, safety, or welfare of the employee, or his/her child, when the employee has been a victim of domestic violence, sexual assault, or stalking

*(cf. 4161.1/4361.1 - Personal Illness/Injury Leave)*

*(cf. 4261.1 - Personal Illness/Injury Leave)*

No employee shall be denied the right to use accrued sick days and the district shall not in any manner discriminate or retaliate against an employee for using or attempting to use sick leave, filing a complaint with the Labor Commissioner, or alleging district violation of Labor Code 245-249. The Superintendent or designee shall display a poster containing required information, provide notice to eligible employees of their sick leave rights, keep records of employees' use of sick leave for three years, and comply with other requirements specified in Labor Code 245-249 and in AR 4161.1/4361.1 - Personal Illness/Injury Leave.

**Release from Employment/Dismissal**

The Board may dismiss a substitute employee at any time at its discretion. (Education Code 44953)

The Board may release a temporary employee at its discretion if the employee has served less than 75 percent of the number of days the regular schools of the district are maintained during one school year. After serving 75 percent of the number of days that district schools are maintained during one school year, a temporary employee may be released as long as he/she is notified, before the last day of June, of the district's decision not to reelect him/her for the following school year. (Education Code 37200, 44954)

*(cf. 4112.9/4212.9/4312.9 - Employee Notifications)*

**Reemployment as a Probationary Employee**

Unless released from employment pursuant to Education Code 44954, any person employed for one complete school year as a temporary employee shall, if reemployed for the following school year in a vacant position requiring certification qualifications, be classified as a probationary employee. With the exception of on-call, day-to-day substitutes, if a temporary or substitute employee performs the duties normally required of certificated employees for at least 75 percent of the number of days the regular schools of the district were maintained in that school year and is then employed as a probationary employee for the following school year, his/her previous employment as a temporary or substitute employee shall be credited as one year's employment as a probationary employee for purposes of acquiring permanent status. (Education Code 44917, 44918, 44920)

*(cf. 4116 - Probationary/Permanent Status)*

BP 4121(d)

**TEMPORARY/SUBSTITUTE PERSONNEL (continued)**

*Vacant position* means a position in which the employee is qualified to serve and which is not filled by a permanent or probationary employee. It shall not include a position which would be filled by a permanent or probationary employee except for the fact that such employee is on leave. (Education Code 44920, 44921)

A temporary employee hired pursuant to item #1 or #2 in the section "Classification" above shall be classified as a probationary employee if the duties continue beyond the time limits of the assignment. (Education Code 44919)

A person employed pursuant to item #5 in the section "Classification" above who is then continued in employment beyond the first semester shall be classified as a probationary employee for the entire school year and shall be reemployed to fill any vacant position in the district for which he/she is certified. Preference for available positions shall be determined by the Board as prescribed by Education Code 44845 and 44846. (Education Code 44921)

With the exception of on-call, day-to-day substitutes, any temporary or substitute employee who was released pursuant to Education Code 44954 but who has nevertheless served in a certificated position in the district for at least 75 percent of each of two consecutive school years shall receive first priority if the district fills a vacant position for the subsequent school year at the grade level at which the employee served during either year. In the case of a departmentalized program, the employee shall have taught the subject matter in which the vacant position occurs. (Education Code 44918)

*Legal Reference:*

EDUCATION CODE

- 22455.5 *Provision of retirement plan information to potential members*
- 22515 *Irrevocable election to join retirement plan*
- 37200 *School calendar*
- 44252.5 *State basic skills assessment required for certificated personnel*
- 44300 *Emergency teaching or specialist permits*
- 44830 *Employment of certificated persons; requirements of proficiency in basic skills*
- 44839.5 *Employment of retirant*
- 44845 *Date of employment*
- 44846 *Criteria for reemployment preferences*
- 44909 *Employees providing services through categorically funded programs*
- 44914 *Substitute and probationary employment computation for classification as permanent employee*
- 44915 *Classification of probationary employees*
- 44916 *Time of classification; statement of employment status*
- 44917 *Classification of substitute employees*
- 44918 *Substitute or temporary employee deemed probationary employee; reemployment rights*
- 44919 *Classification of temporary employees*
- 44920 *Employment of certain temporary employees; classifications*
- 44921 *Employment of temporary employees; reemployment rights (unified and high school districts)*
- 44953 *Dismissal of substitute employees*



BP 4121(e)

**TEMPORARY/SUBSTITUTE PERSONNEL (continued)***44954 Release of temporary employees**44955 Layoff of permanent and probationary employees**44956 Rights of laid-off permanent employees to substitute positions**44957 Rights of laid-off probationary employees to substitute positions**44977 Salary schedule for substitute employees**45030 Substitutes**45041 Computation of salary**45042 Alternative method of computation for less than one school year**45043 Compensation for employment beginning in the second semester**56060-56063 Substitute teachers in special education***GOVERNMENT CODE***3540.1 Educational Employment Relations Act, definitions***LABOR CODE***220 Sections inapplicable to public employees**230 Jury duty; legal actions by domestic violence, sexual assault and stalking victims, right to time off**230.1 Employers with 25 or more employees; domestic violence, sexual assault and stalking victims, right to time off**233 Illness of child, parent, spouse or domestic partner**234 Absence control policy**245-249 Healthy Workplaces, Healthy Families Act of 2014***CODE OF REGULATIONS, TITLE 5***5502 Filing of notice of physical examination for employment of retired person**5503 Physical examination for employment of retired persons**5590 Temporary athletic team coach**80025-80025.5 Emergency substitute teaching permits***COURT DECISIONS***McIntyre v. Sonoma Valley Unified School District (2012) 206 Cal.App.4th 170**Stockton Teachers Association CTA/NEA v. Stockton Unified School District (2012) 204 Cal.App.4th 446**Neily v. Manhattan Beach Unified School District, (2011) 192 Cal.App.4th 187**California Teachers Association v. Vallejo City Unified School District, (2007) 149 Cal.App.4th 135**Bakersfield Elementary Teachers Assn. v. Bakersfield City School District, (2006) 145 Cal.App.4th 1260, 1277**Kavanaugh v. West Sonoma Union High School District, (2003) 29 Cal.4th 911***Management Resources:****WEB SITES***CSBA: <http://www.csba.org>**Commission on Teacher Credentialing: <http://www.ctc.ca.gov>*

# CSBA Sample Board Policy

All Personnel           BP 4140(a)/4240/4340

## BARGAINING UNITS

The Governing Board recognizes the right of district employees to form **a bargaining units**, select an employee organization as their exclusive representative, and be represented by that organization in their employment relationship with the district. The Board is committed to negotiating in good faith with recognized employee organizations and respecting the rights of employees and employee organizations.

*(cf. 4141/4241 - Collective Bargaining Agreement)*

*(cf. 4143/4243 - Negotiations/Consultation)*

*(cf. 9000 - Role of the Board)*

The district shall not dominate or interfere with the formation or administration of any employee organization or contribute financial or other support to it. (Government Code 3543.5)

~~Neither the district nor the employee organization~~ **The district shall not deter or discourage employees from becoming or remaining members of an employee organization,** impose or threaten to impose reprisals on employees, discriminate or threaten to discriminate against employees, or otherwise interfere with, restrain, or coerce employees because of their membership or nonmembership in an employee organization. (Government Code 3543.5, ~~3543.6~~ **3550**)

*(cf. 4119.1/4219.1/4319.1 - Civil and Legal Rights)*

## Formation of Bargaining Units

Certificated and classified employees shall not be included in the same bargaining unit. (Government Code 3545)

The district may recognize a bargaining unit of supervisory employees if: (Government Code 3545)

1. The bargaining unit includes all supervisory employees.
2. The supervisors are not represented by the same organization that represents employees whom the supervisory employees supervise.

*(cf. 4300 - Administrative and Supervisory Personnel)*

*(cf. 4301 - Administrative Staff Organization)*

*(cf. 4312.1 - Contracts)*

BP 4140(b)  
4240  
4340

### BARGAINING UNITS (continued)

For this purpose, *supervisory employee* means any employee, regardless of job description, having the authority, in the interest of the district, to hire, transfer, suspend, layoff, recall, promote, discharge, assign, reward, discipline, assign work, direct, adjust grievance of other employees, or effectively recommend that action. The exercise of this authority shall not be merely routine or clerical in nature, but shall require the use of independent judgment. (Government Code 3540.1)

Employees serving in management, senior management, or confidential positions shall not be represented by an exclusive representative. Such employees may represent themselves individually or may be represented by an employee organization whose membership is composed entirely of employees designated as holding those positions, **but—When represented by an employee organization**, that organization shall not meet and negotiate with the district. For this purpose: (Government Code 3540.1, 3543.4)

1. *Management employee* means any employee who has significant responsibilities for formulating district policies or administering district programs, and whose position is designated as a management position by the Board.
2. *Confidential employee* means any employee who is required to develop or present management positions with respect to employer-employee relations or whose duties normally require access to confidential information that is used to contribute significantly to the development of management positions.

### **Access to Employee Orientations and Contact Information**

**The district shall permit employee organizations access to new employee orientations where newly hired employees are advised, whether in person, online, or through other means or mediums, of their employment status, rights, benefits, duties, responsibilities, or any other employment-related matters. The district shall provide employee organizations at least 10 days' notice in advance of an orientation. However, in any specific instance where an unforeseeable, urgent need critical to the district's operation prevents the required 10 days' notice, a shorter notice may be provided. (Government Code 3555.5, 3556)**

**The structure, time, and manner of the access to new employee orientations shall be determined by mutual agreement of the district and the exclusive representative, following a request to negotiate by either party. If the district and exclusive representative fail to reach an agreement, matters related to the access to new employee orientation shall be subject to compulsory interest arbitration. The district and employee organization may mutually agree to submit any dispute to compulsory interest arbitration at any time. In addition, if any dispute arises during negotiations**

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4240  
4340

### **BARGAINING UNITS (continued)**

**and is not resolved within 45 days after the first meeting or within 60 days after the initial request to negotiate, whichever is earlier, either party may make a demand for compulsory interest arbitration. When any such dispute arises during the summer when the district's administrative office is closed, the timeline shall commence on the first day the administrative office reopens. The decision of the arbitrator shall be final and binding on the parties. (Government Code 3556, 3557)**

The Superintendent or designee **may provide an employee organization with the home address and home telephone number of employees, except any employees performing law enforcement-related functions and any employees who provide written request that the information not be disclosed for this purpose. shall provide an exclusive representative with the name, job title, department, work location, telephone numbers (work, home, and personal cell phone), personal email address(es) on file with the district, and home address of any newly hired employee in the bargaining unit, within 30 days of hire or by the first pay period of the month following hire. In addition, the Superintendent or designee shall provide the same information on all employees in the bargaining unit to an exclusive representative at least every 120 days, unless more frequent or detailed lists are required by agreement with the exclusive representative. (Government Code 3558, 6254.3)**

**However, the Superintendent or designee shall not disclose the home address and any phone numbers on file for employees performing law enforcement-related functions, nor shall he/she disclose the home address, home or personal cell phone number(s), or personal email address(es) of any employee who is a participant in the Safe at Home address confidentiality program pursuant to Government Code 6207 or any employees who provides written request that the information not be disclosed for this purpose. Following receipt of a written request, the district shall remove the employee's home address, home and personal cell phone numbers, and personal email address from any mailing list maintained by the district unless the list is only used by the district to contact the employee. (Government Code 3558, 6207, 6254.3)**

*(cf. 1340 - Access to District Records)*

### **Payment of Dues or Service Fee**

Upon the written request of a recognized employee organization, the Superintendent or designee shall deduct the amount of organization dues or the fair share service fee, determined in accordance with Government Code 3546, from the wages and salary of each employee represented by that employee organization and shall pay that amount to the employee organization. (Education Code 45060, 45168; Government Code 3546)

BP 4140(d)  
4240  
4340

### **BARGAINING UNITS (continued)**

Any employee who is a member of a religious body whose traditional tenets or teachings include objections to joining or financially supporting employee organizations shall not be required to join, maintain membership in, or financially support any employee organization as a condition of employment. However, such an employee may be required to pay an amount equal to the service fee to a designated charitable fund. (Government Code 3546.3)

Each employee organization shall, within 60 days after the end of its fiscal year, provide the Board and the employees who are members of the organization with a detailed financial report consisting of a balance sheet and an operating statement. If the employee organization fails to provide the financial report, the Board may issue an order compelling the organization to provide the financial report or any employee within the organization may petition the Board for such an order. (Government Code 3546.5)

(cf. 3460 - Financial Reports and Accountability)

#### *Legal Reference:*

#### EDUCATION CODE

45060-45061.5 Deduction of fees from salary or wage payment, certificated employees

45100.5 Senior management positions

45104.5 Abolishment of senior classified management positions

45108.5 Definitions of senior classified management employees

45108.7 Waiver of provisions of 45108.5

45168 Deduction of fees from salary or wage payment, classified employees

45220-45320 Merit system, classified employees

#### GOVERNMENT CODE

3540-3549.3 Educational Employment Relations Act, especially:

3540.1 Definitions

3543.4 Management position; representation

3545 Appropriateness of unit; basis

3550-3552 Prohibition on public employers deterring or discouraging union membership

3555-3559 Public employee communication, information and orientation

6205-6210 Confidentiality of addresses for victims of domestic violence, sexual assault or stalking

6254.3 Disclosure of employee contact information to employee organization

6503.5 Joint powers agencies

53260-53264 Employment contracts

#### CODE OF REGULATIONS, TITLE 8

33015-33490 Recognition of exclusive representative; proceedings

33700-33710 Severance of established unit

34020 Petition to rescind organizational security arrangement

34055 Reinstatement of organizational security arrangement

#### COURT DECISIONS

**Janus v. American Federation of State, County and Municipal Employees, Council 31, (7th Cir. 2017) 851 F.3d 746, cert granted Sept. 28, 2017, No. 16-1466**

**Friedrichs v. California Teachers Association, et al., (2016) 136 S.Ct. 1083**

**County of Los Angeles v. Service Employees International Union, Local 721, (2011), 192 Cal.App.4th 1409 (2013) 56 Cal. 4th 905**

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4240  
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**BARGAINING UNITS (continued)**

**Aboud v. Detroit Board of Education, (1977) 431 U.S. 209**

*Management Resources:*

CSBA PUBLICATIONS

Collective Bargaining DVD ROM

Before the Strike: Planning Ahead in Difficult Negotiations, 1996

WEB SITES

CSBA: <http://www.csba.org>

Association of California School Administrators: <http://www.acsa.org>

California Federation of Teachers: <http://www.cft.org>

California School Employees Association: <http://www.csea.com>

California Teachers Association: <http://www.cta.org>

Public Employment Relations Board: <http://www.perb.ca.gov>

# CSBA Sample Board Policy

All Personnel BP 4151(a)/4251/4351

## EMPLOYEE COMPENSATION

In order to recruit and retain employees committed to the district's goals for student learning, the Governing Board recognizes the importance of offering a competitive compensation package which includes salaries and health and welfare benefits.

*(cf. 3100 - Budget)*

*(cf. 3400 - Management of Districts Assets/Accounts)*

*(cf. 4000 - Concepts and Roles)*

*(cf. 4154/4254/4354 - Health and Welfare Benefits)*

The Board shall adopt separate salary schedules for certificated, classified, and supervisory and administrative personnel. These schedules shall comply with law and ~~negotiated~~ **collective bargaining** agreements and shall be printed and made available for review at the district office. (Education Code 45022, 45023, **45160, 45162**)

*(cf. 4121 - Temporary/Substitute Personnel)*

*(cf. 4141/4241 - Collective Bargaining Agreement)*

*(cf. 4143/4243 - Negotiations/Consultation)*

**Each certificated employee, except an employee in an administrative or supervisory position, shall be classified on the salary schedule on the basis of uniform allowance for years of training and years of experience, unless the Board and employee organization negotiate and mutually agree to a salary schedule based on different criteria. Certificated employees shall not be placed in different classifications on the schedule, nor paid different salaries, solely on the basis of the grade levels at which they teach. (Education Code 45028)**

*(cf. 4030 - Nondiscrimination in Employment)*

Salary schedules for staff who are not a part of a bargaining unit shall be determined by the Board at the recommendation of the Superintendent or designee.

*(cf. 4140/4240/4340 - Bargaining Units)*

*(cf. 4312.1 - ~~Contracts~~ **Contracts**)*

~~The Superintendent or designee shall ensure that the district's payroll system complies with all applicable laws and bargaining agreements, including, but not limited to, timelines regarding payment of compensation and deductions of dues for employee organizations.~~

**The Board shall determine the frequency and schedule of salary payments, including whether payments for employees who work less than 12 months per year will be made over the course of the school year or in equal installments over the calendar year. (Education Code 45038, 45039, 45048, 45165)**

BP 4151(b)  
4251  
4351

## EMPLOYEE COMPENSATION (continued)

**The Superintendent or designee shall post a notice explaining the Fair Labor Standards Act's wage and hour provisions in a conspicuous place at each work site. (29 CFR 516.4)**

### **Overtime Compensation**

**A district employee shall be paid an overtime rate of not less than one and one-half times his/her regular rate of pay for any hours worked in excess of eight hours in one day or 40 hours in one work week. However, employees shall be exempt from overtime rules if they are employed as teachers or school administrators or if they qualify as being employed in an executive, administrative, or professional capacity and are paid a fixed salary at or above the salary level established by federal regulations. (Labor Code 510; 29 USC 213; 29 CFR 541.0-541.710, 553.27, 553.32)**

**When authorized in a collective bargaining agreement or other agreement between the district and employees, an employee may take compensatory time off in lieu of overtime compensation, provided he/she has not accrued compensatory time in excess of the limits specified in 29 USC 207. An employee who has requested the use of compensatory time shall be allowed to use such time within a reasonable period after making the request if the use of the compensatory time does not unduly disrupt district operations. (29 USC 207; 29 CFR 553.20-553.25)**

**For each nonexempt employee, the Superintendent or designee shall maintain records on the employee's wages, hours, and other information specified in 29 CFR 516.5-516.6.**

*(cf. 3580 - District Records)*

*(cf. 4112.6/4212.6/4312.6 - Personnel Files)*

#### *Legal Reference:*

##### EDUCATION CODE

*45022-45061.5 Salaries, especially:*

*45023 Availability of salary schedule*

*45028 Salary schedule for certificated employees*

*45160-45169 Salaries for classified employees*

*45268 Salary schedule for classified service in merit system districts*

##### GOVERNMENT CODE

*3540-3549 Meeting and negotiating, especially:*

*3543.2 Scope of representation*

*3543.7 Duty to meet and negotiate in good faith*

##### LABOR CODE

*226 Employee access to payroll records*

*232 Disclosure of wages*

***510 Overtime compensation; length of work day and week; alternative schedules***

##### UNITED STATES CODE, TITLE 26

*409A Deferred compensation plans*



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4251  
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**EMPLOYEE COMPENSATION (continued)**

**UNITED STATES CODE, TITLE 29**

**201-219 Fair Labor Standards Act, especially:**

**203 Definitions**

**207 Overtime**

**213 Exemptions from minimum wage and overtime requirements**

**CODE OF FEDERAL REGULATIONS, TITLE 26**

**1.409A-1 Definitions and covered plans**

**CODE OF FEDERAL REGULATIONS, TITLE 29**

**516.4 Notice of minimum wage and overtime provisions**

**516.5-516.6 Records**

**541.0-541.710 Exemptions for executive, administrative, and professional employees**

**553.1-553.51 Fair Labor Standards Act; applicability to public agencies**

**COURT DECISIONS**

**Flores v. City of San Gabriel, 9th Cir., June 2, 2016, No. 14-56421**

*Management Resources:*

**NATIONAL SCHOOL BOARDS ASSOCIATION PUBLICATIONS**

**NEA and NSBA Joint Guidance on the Tax Consequences of Deferred Compensation—Section 409A of the**

**Internal Revenue Code, January 2008**

**WEB SITES**

**CSBA: <http://www.csba.org>**

**Internal Revenue Service: <http://www.irs.gov>**

**National School Boards Association: <http://www.nsba.org>**

**School Services of California, Inc.: <http://www.sscal.com>**

**U.S. Department of Labor, Wage and Hour Division: <https://www.dol.gov/whd>**

# CSBA Sample Administrative Regulation

All Personnel AR 4157.1(a)/4257.1/4357.1

## WORK-RELATED INJURIES

The Governing Board desires to provide its **In order to provide medical benefits, temporary or permanent disability benefits, wage replacement, retraining or skill enhancement, and/or death benefits in the event that an employee becomes injured or ill in the course of employment, the district shall provide all** employees with insurance and workers' compensation benefits in accordance with law. The Superintendent or designee shall develop an efficient claims handling process **that in order to** reduces costs and facilitates employee recovery.

*(cf. 3320 - Claims and Actions Against the District)*

*(cf. 4032 - Reasonable Accommodation)*

*(cf. 4113.4/4213.4/4313.4 - Temporary Modified/Light-Duty Assignment)*

*(cf. 4154/4254/4354 - Health and Welfare Benefits)*

*(cf. 4157/4257/4357 - Employee Safety)*

*(cf. 4157.2/4257.2/4357.2 - Ergonomics)*

*(cf. 4161.11/4261.11/4361.11 - Industrial Accident/Illness Leave)*

~~An employee shall report any work-related injury or illness to his/her supervisor as soon as practicable. Upon learning of an injury, a supervisor shall promptly report the incident to the Superintendent or designee and the insurance carrier as appropriate. [MOVED DOWN]~~

The Superintendent or designee shall **ensure that notify** every new employee, **at the time of hire or by the end of the first pay period**, is notified of his/her right to receive workers' compensation benefits if injured at work and that injured employees are given notice of rights in accordance with law. **(Labor Code 3551; 8 CCR 15596)**

*(cf. 4112.9/4212.9/4312.9 - Employee Notifications)*

~~The Superintendent or designee shall ensure that notifications regarding workers' compensation are posted in accordance with law. In addition, a notice regarding workers' compensation benefits shall be posted in a conspicuous location frequented by employees, where the notice may be easily read during the workday. (Labor Code 3550)~~

**In the event that an employee is injured or becomes ill in the course of employment, he/she shall report the** ~~An employee shall report any~~ work-related injury or illness to ~~his/her supervisor~~ **the Superintendent or designee** as soon as practicable.

**Within one working day of receiving notice or knowledge of any injury to an employee in the course of employment, the Superintendent or designee shall provide a claim form and notice of potential eligibility for workers' compensation benefits to the employee or, in the case of**

AR 4157.1(b)  
 4257.1  
 4357.1

**WORK-RELATED INJURIES (continued)**

**the employee's death, to his/her dependents. The claim form and notice shall be provided personally or by first class mail. (Labor Code 5401)**

**The Superintendent or designee shall additionally ensure that any employee who is a victim of a crime that occurred at the place of employment is given written notice personally or by first class mail within one working day of the crime, or when the district reasonably should have known of the crime, that the employee is eligible for workers' compensation benefits for injuries, including psychiatric injuries, that may have resulted from the crime. (Labor Code 3553)**

**The Superintendent or designee shall ensure that all employee notices described above are in the form prescribed by the Department of Industrial Relations (DIR), Division of Workers Compensation.**

**OPTION 1: (Districts insured for workers' compensation through a third party insurer)**

**Upon learning of an a work-related injury or illness, or injury or illness alleged to have arisen out of and in the course of employment, a supervisor the Superintendent or designee shall promptly report the incident to the Superintendent or designee and the district's insurance carrier within five days after obtaining knowledge of the injury or illness. as appropriate. If a subsequent death arises as a result of the reported injury or illness, an amended report indicating the death must be filed with the insurance carrier within five days after being notified of or learning about the death. (Labor Code 6409.1)**

**OPTION 2: (Districts insured for workers' compensation through self insurance)**

**Upon learning of a work related injury or illness, or injury or illness alleged to have arisen out of and in the course of employment, the Superintendent or designee shall report the incident to the DIR within five days after obtaining knowledge of the injury or illness. If a subsequent death arises as a result of the reported injury or illness, an amended report indicating the death must be filed with the DIR within five days after being notified of or learning about the death. (Labor Code 6409.1)**

**In addition, in every case involving death or serious injury or illness, the Superintendent or designee shall immediately make a report by telephone or email to the Division of Occupational Safety and Health. (Labor Code 6409.1)**

*Legal Reference: (see next page)*

AR 4157.1(c)  
 4257.1  
 4357.1

## **WORK-RELATED INJURIES (continued)**

### *Legal Reference:*

#### EDUCATION CODE

44984 *Industrial accident and illness leaves, certificated employees*

45192 *Industrial accident and illness leaves, classified employees*

#### LABOR CODE

3200-4855 *Workers' compensation, especially:*

3550-3553 *Employee notice*

3600-3605 *Conditions of liability*

3760 *Report of injury to insurer*

4600 *Provision of medical and hospital treatment by employer*

4906 *Disclosures and statements*

5400-5413 *Notice of injury or death*

6409.1 *Reports*

#### CODE OF REGULATIONS, TITLE 8

15596 *Notice of employee rights*

### *Management Resources:*

#### **DEPARTMENT OF INDUSTRIAL RELATIONS PUBLICATIONS**

**A Guidebook for Injured Workers, 2016**

**Notice to Employees -- Injuries Caused by Work**

**Time of Hire Pamphlet**

**Workers' Compensation Claim Form (DWC 1) & Notice of Potential Eligibility**

#### **WEB SITES**

**California Department of Industrial Relations, Division of Occupational Safety and Health:**

**<http://www.dir.ca.gov/dosh>**

**California Department of Industrial Relations, Division of Workers Compensation:**

**<http://www.dir.ca.gov/dwc>**

# CSBA Sample Administrative Regulation

Certificated Personnel AR 4161.1(a)/4261.1/4361.1

## PERSONAL ILLNESS/INJURY LEAVE

Certificated employees **working employed** five school days **per a** week are entitled to 10 days' leave of absence **with full pay** for personal illness or injury (sick leave), per school year **of service, with full pay**. Employees **who** **working** less than five school days per week (part-time employees) shall be granted sick leave in proportion to the time they work. However, any part-time employee who is entitled to less than three days of paid sick leave due to the amount of time worked shall be granted sick leave pursuant to Labor Code 246, **if he/she is eligible**. (Education Code 44978; **Labor Code 245-249**)

*(cf. 4161/4261/4361 - Leaves)*

*(cf. 4161.9/4261.9/4361.9 - Catastrophic Leave Program)*

### Use of Sick Leave

Certificated employees may use sick leave for absences due to:

1. **Accident or illness, whether or not the absence arises out of or in the course of employment; quarantine which results from contact with other persons having a contagious disease during the employee's performance of his/her duties; or** temporary inability to perform assigned duties because of illness, accident, or quarantine, ~~whether or not the cause of the absence arises out of and in the course of employment~~ (Education Code 44964)

*(cf. 4157.1/4257.1/4357.1 - Work-Related Injuries)*

2. Pregnancy, miscarriage, childbirth, and related recovery (Education Code 44965, 44978)

*(cf. 4161.8/4261.8/4361.8 - Family Care and Medical Leave)*

3. Personal necessity (Education Code 44981)

*(cf. 4161.2/4261.2/4361.2 - Personal Leaves)*

4. Medical and dental appointments, in increments of not less than one hour

5. Industrial accidents or illnesses when leave granted specifically for that purpose has been exhausted (Education Code 44984)

*(cf. 4161.11/4361.11 - Industrial Accident/Illness Leave)*

AR 4161.1(b)  
4261.1  
4361.1

**PERSONAL ILLNESS/INJURY LEAVE (continued)**

~~6. Illness of the employee's child, parent, spouse, domestic partner, or domestic partner's child for up to the amount of sick leave that would be accrued by the employee during six months at his/her then current rate of entitlement (Labor Code 233)~~

**7. 6. In any calendar year, an employee may use the amount of sick leave he/she would accrue during six months at his/her current rate of entitlement for the following: (Labor Code 233, 246.5)**

**a. Need of the employee or his/her family member, as defined in Labor Code 245.5, for the diagnosis, care, or treatment of an existing health condition of, or for preventive care for, the employee or his/her family member as defined in Labor Code 245.5 (Labor Code 246.5)**

**8. b. Need of the employee to seek or obtain or seek any relief or medical attention specified in Labor Code 230(c) and/or 230.1(a) for the health, safety, or welfare of the employee, or his/her child, when the employee has been a victim of domestic violence, sexual assault, or stalking (Labor Code 246.5)**

An employee may take sick leave at any time during the school year, even if credit for sick leave has not yet been accrued. (Education Code 44978)

An employee shall reimburse the district for any unearned sick leave used as of the date of his/her termination.

Unused days of sick leave shall be accumulated from year to year without limitation. (Education Code 44978)

At the beginning of each school year, employees shall be notified of the amount of sick leave they have accumulated.

The district shall not require new employees to waive leave accumulated in a previous district. (Education Code 44979, 44980)

The Superintendent or designee shall notify any certificated employee who leaves the district after at least one school year of employment that if the employee accepts a certificated position in another district, county office of education, or community college district within one year, he/she may request that the district transfer his/her accumulated sick leave to the new employer. (Education Code 44979, 44980)

AR 4161.1(c)  
4261.1  
4361.1

## PERSONAL ILLNESS/INJURY LEAVE (continued)

### Notification of Absence

An employee shall notify the district of his/her need to be absent as soon as such need is known, so that substitute services may be secured. This notification shall include an estimate of the expected duration of absence. If the absence becomes longer than estimated, the employee shall so notify the district. If the duration of absence becomes shorter than estimated, the employee shall notify the district not later than three o'clock in the afternoon of the day preceding the day on which he/she intends to return to work. If the employee fails to notify the district and the failure results in a substitute being secured, the cost of the substitute shall be deducted from the employee's pay.

*(cf. 4121 - Temporary/Substitute Personnel)*

### Continued Absence After Available Sick Leave Is Exhausted/Differential Pay

#### **OPTION 1:**

~~During each school year, when a certificated employee has exhausted all available sick leave, including all accumulated sick leave, and, due to illness or injury, continues to be absent from his/her duties for an additional period up to five school months, the employee shall receive his/her regular salary minus the actual cost of a substitute to fill the position. If the district has made every reasonable effort to secure the services of a substitute and has been unable to do so, the amount that would have been paid to a substitute shall be deducted from the employee's salary. (Education Code 44977)~~

An employee shall not be provided more than one five-month period per illness or injury. However, if the school year ends before the five-month period is exhausted, the employee may take the balance of the five-month period in a subsequent school year. (Education Code 44977)

#### **OPTION 2:**

**After a certificated employee has exhausted all available sick leave, including all accumulated sick leave, and, due to illness or injury, continues to be absent for an additional period up to five months, he/she shall receive 50 percent of his/her regular salary during the additional period of absence. (Education Code 44983)**

**In addition, during each school year, any certificated employee who has exhausted all available sick leave, including accumulated sick leave, and continues to be absent on account of maternity or paternity leave (baby bonding) pursuant to Government Code 12945.2 shall receive, for up to 12 school weeks, his/her regular salary minus the actual cost of a substitute to fill the position or, if no substitute was employed, the amount that would have been paid had a substitute been employed. The 12-week period shall be reduced by any period of sick**

AR 4161.1(d)  
 4261.1  
 4361.1

### PERSONAL ILLNESS/INJURY LEAVE (continued)

**leave, including accumulated sick leave, taken during a period of such maternity or paternity leave. (Education Code 44977.5)**

If a certificated employee is not medically able to resume his/her duties after the five-month period provided pursuant to Education Code 44977, the employee shall be placed either in another position or on a reemployment list. Placement on the reemployment list shall be for 24 months for probationary employees or 39 months for permanent employees and shall begin at the expiration of the five-month period. If during this time the employee becomes medically able, he/she shall be returned to employment in a position for which he/she is credentialed and qualified. (Education Code 44978.1)

*(cf. 4116 - Probationary/Permanent Status)*

### Verification Requirements

After any absence due to illness or injury, the employee shall verify the absence by submitting a completed and signed district absence form to his/her immediate supervisor.

The Superintendent or designee ~~may, at any time, require additional written verification by the employee's physician or other authorized health care provider. Such~~ **may require** verification ~~shall be required~~ whenever an employee's absence record shows chronic absenteeism or a pattern of absences immediately before or after weekends and/or holidays or whenever available evidence clearly indicates that an absence is not related to illness or injury.

In addition, the Superintendent or designee may require an employee to visit a physician selected by the district, at district expense, in order to receive a report on the medical condition of the employee. The report shall include a statement as to the employee's need for further leave of absence and a prognosis as to when the employee will be able to return to work. If the report concludes that the employee's condition does not warrant continued absence, the Superintendent or designee may, after giving notice to the employee, deny further leave.

Any district request for additional verification by an employee's physician or a district-selected physician shall be in writing and shall specify that the report to be submitted to the district should not contain the employee's genetic information.

Any genetic information received by the district on behalf of an employee shall be treated as a confidential medical record, maintained in a file separate from the employee's personnel file, and shall not be disclosed except in accordance with 29 CFR 1635.9.



AR 4161.1(e)  
4261.1  
4361.1

### **PERSONAL ILLNESS/INJURY LEAVE (continued)**

Before returning to work, an employee who has been absent for surgery, hospitalization, or extended medical treatment may be asked to submit a letter from his/her physician stating that he/she is able to return to duty and stipulating any necessary restrictions or limitations.

*(cf. 4032 - Reasonable Accommodation)*

*(cf. 4113.4/4213.4/4313.4 - Temporary Modified/Light-Duty Assignment)*

### **Healthy Workplaces, Healthy Families Act Requirements**

No employee shall be denied the right to use accrued sick days, and the district shall not in any manner discriminate or retaliate against an employee for using or attempting to use sick leave, filing a complaint with the Labor Commissioner, or alleging district violation of Labor Code 245-249.

To ensure the district's compliance with Labor Code 245-249, the Superintendent or designee shall:

1. At a conspicuous location in each workplace, display a poster on paid sick leave that includes the following information:
  - a. That an employee is entitled to accrue, request, and use paid sick days
  - b. The amount of sick days provided by Labor Code 245-249
  - c. The terms of use of paid sick days
  - d. That discrimination or retaliation against an employee for requesting or using sick leave is prohibited by law and an employee has the right to file a complaint with the Labor Commissioner if the district discriminates or retaliates against him/her
2. Provide at least 24 hours or three days of paid sick leave to each eligible employee to use per year and allow eligible employees to use accrued sick leave upon reasonable request
3. Provide eligible employees written notice, on their pay stub or other document issued with their pay check, of the amount of paid sick leave they have available

*(cf. 4112.9/4212.9/4312.9 - Employee Notifications)*

4. Keep a record documenting the hours worked and paid sick days accrued and used by each eligible employee for three years

AR 4161.1(f)  
4261.1  
4361.1

## PERSONAL ILLNESS/INJURY LEAVE (continued)

### Legal Reference:

#### EDUCATION CODE

44964 Power to grant leave of absence in case of illness, accident, or quarantine

44965 Granting of leaves of absence for pregnancy and childbirth

44976 Transfer of leave rights when school is transferred to another district

44977 Salary deduction during absence from duties up to five months after sick leave is exhausted

**44977.5 Salary deduction during absence from duties for maternity or paternity leave up to 12 weeks after sick leave is exhausted**

44978 Provisions for sick leave of certificated employees

44978.1 Inability to return to duty; placement in another position or on reemployment list

44979 Transfer of accumulated sick leave to another district

44980 Transfer of accumulated sick leave to a county office of education

44981 Leave of absence for personal necessity

44983 Exception to sick leave when district adopts specific rule

44984 Industrial accident or illness

44986 Leave of absence for disability allowance applicant

#### LABOR CODE

220 Sections inapplicable to public employees

230 Jury duty; legal actions by domestic violence, sexual assault and stalking victims, right to time off

230.1 Employers with 25 or more employees; domestic violence, sexual assault and stalking victims, right to time off

233 Illness of child, parent, spouse or domestic partner

234 Absence control policy

245-249 Healthy Workplaces, Healthy Families Act of 2014

#### CODE OF REGULATIONS, TITLE 5

5601 Transfer of accumulated sick leave

#### UNITED STATES CODE, TITLE 42

2000ff-2000ff-11 Genetic Information Nondiscrimination Act of 2008

#### CODE OF FEDERAL REGULATIONS, TITLE 29

1635.1-1635.12 Genetic Information Nondiscrimination Act of 2008

#### COURT DECISIONS

Veguez v. Governing Board of Long Beach Unified School District, (2005) 127 Cal.App.4th 406

# CSBA Sample Administrative Regulation

Classified Personnel AR 4261.1(a)

## PERSONAL ILLNESS/INJURY LEAVE

Classified employees employed five days a week are entitled to 12 days leave of absence with full pay **per fiscal year** for personal illness or injury (sick leave) **per fiscal year**. Employees who work less than a full fiscal year or fewer than five days a week (part-time employees) shall be granted sick leave in proportion to the time they work. However, any part-time employee whose work hours are so few as to entitle him/her to less than 24 hours of paid sick leave per fiscal year shall be granted sick leave pursuant to Labor Code 246, if he/she is eligible. (Education Code 45191; Labor Code 245-249)

*(cf. 4161/4261/4361 - Leaves)*

### Use of Sick Leave

A classified employee may use sick leave for absences due to:

1. Accident or illness, whether or not the absence arises out of or in the course of employment, or by quarantine which results from contact with other persons having a contagious disease during the employee's performance of his/her duties (Education Code 45199)

2. Pregnancy, childbirth, and recovery (Education Code 45193)

*(cf. 4161.8/4261.8/4361.8 - Family Care and Medical Leave)*

3. Personal necessity as specified in Education Code 45207

*(cf. 4161.2/4261.2/4361.2 - Personal Leaves)*

4. Medical or dental appointments, in increments of not less than one hour

5. Industrial accident or illness when leave granted specifically for that purpose has been exhausted (Education Code 45192)

*(cf. 4261.11 - Industrial Accident/Illness Leave)*

~~6. Illness of the employee's child, parent, spouse, domestic partner, or domestic partner's child for up to the amount of leave that would be accrued during six months for personal illness or injury (Labor Code 233)~~

AR 4261.1(b)

**PERSONAL ILLNESS/INJURY LEAVE** (continued)

**7. 6. In any calendar year, an employee may use the amount of sick leave he/she would accrue during six months at his/her current rate of entitlement for the following: (Labor Code 233, 245.5, 246.5)**

- a.** Need of the employee or his/her family member, as defined in Labor Code 245.5, for **the** diagnosis, care, or treatment of an existing health condition or for preventive care **(Labor Code 246.5)**
- 8. b.** Need of the employee to **seek or** obtain **or seek** any relief or medical attention specified in Labor Code 230(c) and 230.1(a) for the health, safety, or welfare of the employee, or his/her child, when the employee has been a victim of domestic violence, sexual assault, or stalking **(Labor Code 246.5)**

An employee may take leave for personal illness or injury at any time during the year, even if credit for such leave has not yet been accrued. However, a new full-time classified employee shall not be entitled to more than six days of sick leave until he/she has completed six months of active service with the district. (Education Code 45191)

Unused days of sick leave shall be accumulated from year to year without limitation. (Education Code 45191)

An employee shall reimburse the district for any unearned sick leave used as of the date of his/her termination.

The district shall not require newly employed classified employees to waive leave accumulated in a previous district. However, if the employee's previous employment was terminated for cause, the transfer of the accumulated leave shall be made only if approved by the Governing Board. (Education Code 45202)

The Superintendent or designee shall notify any classified employee whose employment with the district is terminated after at least one calendar year for reasons other than for cause that, if he/she accepts employment in another district, county office of education, or community college district within one year of the termination of employment, he/she shall be entitled to request that the district transfer his/her accumulated sick leave to his/her new employer. (Education Code 45202)

**Notification of Absence**

An employee shall notify the Superintendent or the designated manager or supervisor of his/her need to be absent as soon as such need is known so that the services of a substitute may be secured as necessary. This notification shall include an estimate of the expected duration of absence. If the absence becomes longer than estimated, the employee shall so notify the district. If the duration of absence becomes shorter than estimated, the employee shall notify the district not later than

AR 4261.1(c)

**PERSONAL ILLNESS/INJURY LEAVE (continued)**

three o'clock in the afternoon of the day preceding the day on which he/she intends to return to work. If the employee fails to notify the district and the failure results in a substitute being secured, the cost of the substitute shall be deducted from the employee's pay.

**Continued Absence After Available Sick Leave Is Exhausted/Differential Pay**

**OPTION 1:**

~~A classified employee who has exhausted all paid leaves, including sick leave, shall for the remainder of the five month period of absence to which he/she is entitled, receive his/her salary minus the actual amount paid a substitute to fill the employee's position during his/her absence. (Education Code 45196)~~

~~The five month period shall commence on the first day of the leave of absence and shall run concurrently with any other paid leave.~~

**OPTION 2:**

**Each year, each regular classified employee shall be credited with no fewer than 100 working days of paid leave for personal illness or injury, including current year and accumulated days of leave. When the current year and accumulated days at full pay are exhausted, the remainder of the 100 days shall be compensated at 50 percent of the employee's regular salary. Any of the 100 days of leave not used during the year in which they are credited shall be forfeited and shall not accumulate from year to year. This paid leave shall be exclusive of any other paid leave, holidays, vacation, or compensatory time to which the employee may be entitled. (Education Code 45196)**

**Extension of Leave**

A permanent employee who is absent because of a personal illness or injury and who has exhausted all available sick leave, vacation, compensatory overtime, and any other paid leave shall be so notified, in writing, and offered an opportunity to request additional leave. The Board may grant the employee additional leave, paid or unpaid, for a period not to exceed six months and may renew this leave for two additional six-month periods or for lesser periods. The total additional leave granted shall not exceed 18 months. (Education Code 45195)

*(cf. 4216 - Probationary/Permanent Status)*

If the employee is still unable to resume his/her duties after all available paid and unpaid leaves have been exhausted, the employee shall be placed on a reemployment list for a period of 39 months. If during this time the employee becomes able to resume the duties of his/her position, he/she shall be offered reemployment in the first vacancy in the classification of his/her previous assignment. During the 39 months, the employee's reemployment shall take preference over all

AR 4261.1(d)

### **PERSONAL ILLNESS/INJURY LEAVE (continued)**

other applicants except those laid off for lack of work or lack of funds, in which case the employee shall be ranked according to his/her seniority. (Education Code 45195)

#### **Verification Requirements**

After any absence due to illness or injury, the employee shall submit a completed and signed district absence form to his/her immediate supervisor.

The Superintendent or designee may, ~~at any time,~~ require **additional written verification by the employee's physician or medical practitioner.** ~~Such verification shall be required~~ whenever an employee's absence record shows chronic absenteeism or a pattern of absences immediately before or after weekends and/or holidays or whenever available evidence clearly indicates that an absence is not related to illness or injury.

In addition, the Superintendent or designee may require an employee to visit a physician selected by the district, at district expense, in order to receive a report on the medical condition of the employee. The report shall include a statement as to the employee's need for additional leave of absence and a prognosis as to when the employee will be able to return to work. If the report concludes that the employee's condition does not warrant continued absence, the Superintendent or designee may, after giving notice to the employee, deny the request for additional leave.

Any district request for additional verification by an employee's physician or a district-selected physician shall be in writing and shall specify that the report to be submitted to the district should not contain the employee's genetic information.

Any genetic information received by the district on behalf of an employee shall be treated as a confidential medical record, maintained in a file separate from the employee's personnel file, and shall not be disclosed except in accordance with 29 CFR 1635.9.

Before returning to work, an employee who has been absent for surgery, hospitalization, or extended medical treatment may be asked to submit a letter from his/her physician stating that he/she is able to return to work and stipulating any recommended restrictions or limitations.

*(cf. 4032 - Reasonable Accommodation)*

*(cf. 4113.4/4213.4/4313.4 - Temporary Modified/Light-Duty Assignment)*

#### **Short-Term and Substitute Employees**

**OPTION 1: Except for a retired annuitant who is not reinstated to the retirement system, any short-term or substitute employee who works for 30 or more days within a year of his/her employment shall be entitled to one hour of paid sick leave for every 30 hours worked. Accrued paid sick days shall carry over to the following year of employment, up to a maximum of 48 hours. (Labor Code 246)**

AR 4261.1(e)

**PERSONAL ILLNESS/INJURY LEAVE (continued)**

**OPTION 2:** Except for a retired annuitant who is not reinstated to the retirement system, any short-term or substitute employee who works for 30 or more days within a year of his/her employment shall accrue, on a regular basis, paid sick leave of up to 24 hours by the 120th calendar day of his/her employment or each calendar year or 12-month period. Accrued paid sick days shall carry over to the following year of employment, up to a maximum of 48 hours. (Labor Code 246)

**OPTION 3:** Except for a retired annuitant who is not reinstated to the retirement system, any short-term or substitute employee who works for 30 or more days within a year of his/her employment shall be credited with 24 hours of paid sick leave for that year. Unused sick leave shall not carry over to the following year of employment. (Labor Code 246)

Any short-term or substitute employee may begin to use accrued paid sick days on the 90th day of his/her employment, after which he/she may use the sick days as they are accrued. (Labor Code 246)

A short-term or substitute employee may use accrued sick leave for absences due to: (Labor Code 246.5)

1. His/her own need or the need of a family member, as defined in Labor Code 245.5, for the diagnosis, care, or treatment of an existing health condition or for preventive care
2. Need of the employee to obtain or seek any relief or medical attention specified in Labor Code 230(c) and 230.1(a) for the health, safety, or welfare of the employee, or his/her child, when the employee has been a victim of domestic violence, sexual assault, or stalking

**Healthy Workplaces, Healthy Families Act Requirements**

No employee, including a short-term or substitute employee, shall be denied the right to use accrued sick days and the district shall not in any manner discriminate or retaliate against an employee for using or attempting to use sick leave, filing a complaint with the Labor Commissioner, or alleging district violation of Labor Code 245-249.

To ensure the district's compliance with Labor Code 245-249, the Superintendent or designee shall:

1. At a conspicuous location in each workplace, display a poster on paid sick leave that includes the following information:
  - a. That an employee is entitled to accrue, request, and use paid sick days
  - b. The amount of sick days provided by Labor Code 245-249
  - c. The terms of use of paid sick days

AR 4261.1(f)

**PERSONAL ILLNESS/INJURY LEAVE** (continued)

- d. That discrimination or retaliation against an employee for requesting or using sick leave is prohibited by law and an employee has the right to file a complaint with the Labor Commissioner if the district discriminates or retaliates against him/her
2. Provide at least 24 hours or three days of paid sick leave to each eligible employee to use per year and allow eligible employees to use accrued sick leave upon reasonable request
3. Provide eligible employees written notice, on their pay stub or other document issued with their pay check, of the amount of paid sick leave they have available  
(*cf. 4112.9/4212.9/4312.9 - Employee Notifications*)
4. Keep a record documenting the hours worked and paid sick days accrued and used by each eligible employee for three years

*Legal Reference:*

EDUCATION CODE

45103 Substitute employees

45190 Leaves of absence and vacations

45191 Leaves of absence for illness and injury

45193 Leave of absence for pregnancy (re use of sick leave under certain circumstances)

45195 Additional leave for nonindustrial accident or illness; reemployment preference

45196 Salary; deductions during sick leave

45202 Transfer of accumulated sick leave and other benefits

LABOR CODE

230 Jury duty; legal actions by domestic violence, sexual assault and stalking victims, right to time off

230.1 Employers with 25 or more employees; domestic violence, sexual assault and stalking victims, right to time off

233 Illness of child, parent, spouse or domestic partner

245-249 Healthy Workplaces, Healthy Families Act of 2014

COURT DECISIONS

California School Employees Association v. Colton Joint Unified School District, (2009) 170 Cal.App.4th 957

California School Employees Association v. Tustin Unified School District, (2007) 148 Cal.App.4th 510

ATTORNEY GENERAL OPINIONS

53 Ops.Cal.Atty.Gen. 111 (1970)



# CSBA Sample Administrative Regulation

All Personnel AR 4161.2(a)/4261.2/4361.2

## PERSONAL LEAVES

**Personal leaves granted to district employees shall be used as permitted in this administrative regulation, other Board-approved policy or district regulation, or applicable collective bargaining agreement.**

For the purpose of any personal leave offered pursuant to state law, a registered domestic partner shall have the same rights, protections, and benefits as a spouse and protections provided to a spouse's child shall also apply to a child of a registered domestic partner. (Family Code 297.5)

Whenever possible, employees shall request personal leaves in advance and prepare suitable instructions, including lesson plans as applicable, for a substitute employee.

*(cf. 4121 - Temporary/Substitute Personnel)*

## Bereavement

Employees are entitled to a leave of up to three days, or five days if out-of-state travel is required, upon the death of any member of the employee's immediate family. No deduction shall be made from the employee's salary, nor shall such leave be deducted from any other leave to which the employee is entitled. (Education Code 44985, 45194)

*(cf. 4161/4261/4361 - Leaves)*

Members of the immediate family include: (Education Code 44985, 45194)

1. The mother, father, grandmother, grandfather, or grandchild of the employee or of the employee's spouse
2. The employee's spouse, son, son-in-law, daughter, daughter-in-law, brother, or sister
3. Any relative living in the employee's immediate household

At the employee's request, bereavement leave may be extended under personal necessity leave provisions as provided in the section "Personal Necessity" below. (Education Code 44981, 45207)

## Personal Necessity

Employees may use a maximum of seven days of their accrued personal illness/injury leave (sick leave) during each school year for reasons of personal necessity. (Education Code 44981, 45207)

AR 4161.2(b)  
4261.2  
4361.2

### PERSONAL ILLNESS/INJURY LEAVE (continued)

*(cf. 4161.1/4361.1 - Personal Illness/Injury Leave)*

*(cf. 4261.1 - Personal Illness/Injury Leave)*

Acceptable reasons for the use of personal necessity leave include:

1. Death of a member of the employee's immediate family when the number of days of absence exceeds the limits set by bereavement leave provisions (Education Code 44981, 45207)
2. An accident involving the **employee's person or employee or his/her** property or the person or property of a member of the employee's immediate family (Education Code 44981, 45207)
3. **A serious** illness, **preventive care, or other need** of a member of the ~~certificated~~ employee's **immediate** family, **as defined in Labor Code 245.5** (Education Code 44981; **Labor Code 246.5**)

*(cf. 4161.8/4261.8/4361.8 - Family Care and Medical Leave)*

4. A classified employee's appearance in any court or before any administrative tribunal as a litigant, party, or witness under subpoena or other order (Education Code 45207)
5. Fire, flood, or other immediate danger to the home of the employee
6. Personal business of a serious nature which the employee cannot disregard

Leave for personal necessity may be allowed for other reasons at the discretion of the Superintendent or designee. However, personal necessity leave shall not be granted for purposes of personal convenience, for the extension of a holiday or vacation, or for matters which can be taken care of outside of working hours. The Superintendent or designee shall have final discretion as to whether or not a request reflects personal necessity.

Advance permission shall not be required of **any an** employee in any case involving the death of a member of the employee's immediate family, an accident involving the employee's person or property or the person or property of a member of his/her immediate family, or the **serious** illness **or other need** of a member of the employee's **immediate** family. (Education Code 44981, 45207)

**However, For any leave that is planned, or where the need for leave is foreseeable, an employee shall notify the Superintendent or designee in advance. In all other circumstances,** the employee shall notify the Superintendent or designee of the need for the leave as soon as practicable.

AR 4161.2(c)  
4261.2  
4361.2

### **PERSONAL ILLNESS/INJURY LEAVE (continued)**

After any absence due to personal necessity, the employee shall verify the absence by submitting a completed and signed district absence form to his/her immediate supervisor.

#### **Legal Duties**

An employee may take time off work in order to: (Labor Code 230)

1. Serve on an inquest jury or trial jury
2. Comply with a subpoena or other court order to appear as a witness

Notices, summons, and subpoenas for court appearances shall be submitted to the district office when requesting leave.

A classified employee called for jury duty shall be granted leave with pay up to the amount of the difference between his/her regular earnings and any amount received for jury fees. (Education Code 44037)

A certificated employee **who is called for jury duty** also shall be granted leave **for jury duty** with pay up to the **amount of the** difference between his/her regular earnings and any **amount received for jury fees he/she received**.

**Employees** An employee shall be granted leave **with pay** to appear in court as **a** witnesses other than **a** litigants or to respond to an official order from another governmental jurisdiction for reasons not brought about through the connivance or misconduct of the employee. Such **an** employees shall receive **pay up to the amount of** the difference between **the employee's his/her** regular earnings and any **amount received for** witness fees **he/she received**.

#### **Leaves for Crime Victims**

An employee may be absent from work in order to attend judicial proceedings related to a crime when he/she is a victim, or an immediate family member, registered domestic partner, or child of a registered domestic partner of a victim, of any of the following crimes: (Labor Code 230.2)

1. A violent felony as defined in Penal Code 667.5(c)
2. A serious felony as defined in Penal Code 1192.7(c)
3. A felony provision of law proscribing theft or embezzlement

AR 4161.2(d)  
4261.2  
4361.2

### **PERSONAL ILLNESS/INJURY LEAVE (continued)**

For these purposes, the employee may use vacation, personal leave, personal illness/injury leave, unpaid leave, or compensatory time off that is otherwise available to the employee. (Labor Code 230.2)

Prior to taking time off, an employee shall give his/her supervisor a copy of the notice of each scheduled proceeding that is provided by the responsible agency, unless advance notice is not feasible. When advance notice is not feasible or an unscheduled absence occurs, the employee shall, within a reasonable time after the absence, provide documentation evidencing the judicial proceeding from the court or government agency setting the hearing, the district attorney or prosecuting attorney's office, or the victim/witness office that is advocating on behalf of the victim. (Labor Code 230.2)

The district shall keep confidential any records pertaining to the employee's absence from work by reason of this leave. (Labor Code 230.2)

### **Leaves for Victims of Domestic Violence, Sexual Assault and Stalking**

An employee who is a victim of domestic violence, sexual assault, or stalking as defined by law may use vacation, sick leave, personal leave, or compensatory time off that is otherwise available to him/her under the terms of his/her employment to attend to the following activities: (Labor Code 230, 230.1, 246.5)

1. Obtain or attempt to obtain any relief, including, but not limited to, a temporary restraining order, restraining order, or other injunctive relief to help ensure the health, safety, or welfare of the employee or his/her child
2. Seek medical attention for injuries caused by domestic violence, sexual assault, or stalking
3. Obtain services from a domestic violence shelter, program, or rape crisis center as a result of domestic violence, sexual assault, or stalking
4. Obtain psychological counseling related to an experience of domestic violence, sexual assault, or stalking
5. Participate in safety planning and take other actions to increase safety from future domestic violence, sexual assault, or stalking, including temporary or permanent relocation

Prior to taking time off, an employee shall give reasonable notice to his/her supervisor, unless advance notice is not feasible. When an unscheduled absence occurs, the employee shall provide,

AR 4161.2(e)  
4261.2  
4361.2

### PERSONAL ILLNESS/INJURY LEAVE (continued)

within a reasonable period of time, certification of the absence in the form of any of the following: (Labor Code 230, 230.1)

1. A police report indicating that the employee was a victim of domestic violence, sexual assault, or stalking
2. A court order protecting or separating the employee from the perpetrator of an act of domestic violence, sexual assault, or stalking, or other evidence from the court or prosecuting attorney that the employee has appeared in court
3. Documentation from a domestic violence or sexual assault counselor as defined in Evidence Code 1037.1 or 1035.2, licensed medical professional or health care provider, or counselor that the employee was undergoing treatment for physical or mental injuries or abuse resulting in victimization from an act of domestic violence, sexual assault, or stalking

The district shall maintain the confidentiality of such an employee to the extent authorized by law. (Labor Code 230, 230.1)

### Personal Leave for ~~a Child's School~~ **Child-Related** Activities

Any employee who is a parent/guardian ~~or grandparent~~ of one or more children ~~enrolled in~~ **of an age to attend any of** grades K-12 or ~~a licensed day care facility~~ **a program offered by a licensed child care provider** may use up to 40 hours of personal leave, vacation, or compensatory time off each school year in order to: ~~participate in school or day care activities. Such leave shall not exceed eight hours in any month of the year.~~ **(Labor Code 230.8)**

1. **Find, enroll, or reenroll his/her child in a school or with a licensed child care provider or to participate in activities of the school or child care provider, provided the employee gives reasonable advance notice of the absence. Time off for this purpose shall not exceed eight hours in any calendar month. (Labor Code 230.8)**
2. **Address a school or child care emergency, provided the employee gives notice. An emergency exists when the child cannot remain in school or with a child care provider due to one of the following circumstances:**
  - a. **A request by the school or child care provider that the child be picked up**
  - b. **An attendance policy, excluding planned holidays, that prohibits the child from attending or requires that the child be picked up from the school or child care provider**

AR 4161.2(f)  
4261.2  
4361.2

**PERSONAL ILLNESS/INJURY LEAVE (continued)**

**c. Behavioral or discipline problems**

**d. Closure or unexpected unavailability of the school or child care provider, excluding planned holidays**

**e. A natural disaster, including, but not limited to, fire, earthquake, or flood**

*(cf. 5148 - Child Care and Development)*

**For purposes of this leave, parent/guardian includes a parent, guardian, stepparent, foster parent, grandparent, or person who stands in loco parentis to a child. (Labor Code 230.8)**

In lieu of using vacation, personal leave, or compensatory time off, eligible employees may take unpaid leave for this purpose.

If **both two or more** parents/guardians of a child are employed at the same work site, this leave shall be allowed for the **first** parent/guardian who **applies—first gives notice to the district**. Simultaneous absence by **the second another** parent/guardian **of the child** may be granted by the Superintendent or designee. (Labor Code 230.8)

Upon request by the Superintendent or designee, the employee shall provide documentation from the school or licensed ~~day care facility~~ **child care provider** that he/she ~~participated in school or licensed day care facility activities~~ **engaged in permitted child-related activities** on a specific date and at a particular time. (Labor Code 230.8)

**Service on Education Boards and Committees**

Upon request, a certificated employee shall be granted up to 20 school days of paid leave per school year for service performed within the state on any education board, commission, committee, or group authorized by Education Code 44987.3 provided that all of the following conditions are met: (Education Code 44987.3)

1. The service is performed within the state.
2. The board, commission, organization, or group informs the district in writing of the service.
3. The board, commission, organization, or group agrees, prior to the service, to reimburse the district, upon the district's request, for compensation paid to the employee's substitute and for actual related administrative costs.

AR 4161.2(g)  
 4261.2  
 4361.2

## **PERSONAL ILLNESS/INJURY LEAVE (continued)**

### **Employee Organization Activities**

Upon request, any certificated or classified employee shall be granted a leave of absence without loss of compensation to serve as an elected officer of a district employee organization or any statewide or national employee organization with which the employee organization is affiliated. The leave shall include, but is not limited to, absence for purposes of attending periodic, stated, special, or regular meetings of the body of the organization. (Education Code 44987, 45210)

*(cf. 4140/4240/4340 - Bargaining Units)*  
*(cf. 4143/4243 - Negotiations)*

Upon request of an employee organization in the district or its state or national affiliate, a reasonable number of unelected classified employees shall be granted a leave of absence without loss of compensation for the purpose of attending important organizational activities authorized by the organization. The employee organization shall provide reasonable notification to the Superintendent or designee when requesting a leave of absence for employees for this purpose. (Education Code 45210)

When leave is granted for any of the above purposes, the employee organization shall reimburse the district within 10 days after receiving the district's certification of payment of compensation to the employee. (Education Code 44987, 45210)

### **Religious Leave**

The Superintendent or designee may grant an employee up to three days of leave per year for religious purposes, provided that the leave is requested in advance and that it does not cause additional district expenditures, the neglect of assigned duties, or any other unreasonable hardship on the district.

The Superintendent or designee shall deduct the cost of hiring a substitute, when required, from the wages of the employee who takes religious leave.

No employee shall be discriminated against for using this leave or any additional days of unpaid leave granted for religious observances at the discretion of the Superintendent or designee.

### **Spouse on Leave from Military Deployment**

An employee who works an average of 20 hours or more per week and whose spouse is a member of the United States Armed Forces, National Guard, or reserves may take up to 10 days of unpaid leave during a period that his/her spouse is on leave from deployment during a military conflict, as defined in Military and Veterans Code 395.10. (Military and Veterans Code 395.10)

AR 4161.2(h)  
 4261.2  
 4361.2

### **PERSONAL ILLNESS/INJURY LEAVE (continued)**

Within two business days of receiving official notice that his/her spouse will be on leave from deployment, the employee shall provide the Superintendent or designee with notice of his/her intention to take the leave. The employee shall submit written documentation certifying that his/her spouse will be on leave from deployment during the time that the leave is requested. (Military and Veterans Code 395.10)

### **Leave for Emergency Duty**

An employee may take time off to perform emergency duty as a volunteer firefighter, a reserve peace officer, or emergency rescue personnel. (Labor Code 230.3)

Any employee who performs duty as a volunteer firefighter, reserve peace officer, or emergency rescue personnel shall be permitted to take temporary leaves of absence, not to exceed an aggregate total of 14 days per calendar year, for the purpose of engaging in fire, law enforcement, or emergency rescue training. (Labor Code 230.4)

### **Civil Air Patrol Leave**

An employee may take up to 10 days of unpaid leave per calendar year, beyond any leave otherwise available to him/her, to respond to an emergency operational mission of the California Civil Air Patrol, provided that the employee has been employed by the district for at least a 90-day period immediately preceding the leave. Such leaves shall not exceed three days for a single mission, unless an extension is granted by the governmental entity authorizing the mission and is approved by the Superintendent or designee. (Labor Code 1501, 1503)

The employee shall give the district as much advance notice as possible of the intended dates of the leave. The Superintendent or designee may require certification from the proper Civil Air Patrol authority to verify the eligibility of the employee for the leave and may deny the leave if the employee fails to provide the required certification. (Labor Code 1503)

#### *Legal Reference:*

#### EDUCATION CODE

- 44036-44037 Leaves of absence for judicial and official appearances*
- 44963 Power to grant leaves of absence (certificated)*
- 44981 Leave of absence for personal necessity (certificated)*
- 44985 Leave of absence due to death in immediate family (certificated)*
- 44987 Service as officer of employee organization (certificated)*
- 44987.3 Leave of absence to serve on certain boards, commissions, etc.*
- 45190 Leaves of absence and vacations (classified)*
- 45194 Bereavement leave of absence (classified)*
- 45198 Effect of provisions authorizing leaves of absence*
- 45207 Personal necessity (classified)*
- 45210 Service as officer of employee organization (classified)*



AR 4161.2(i)  
 4261.2  
 4361.2

**PERSONAL ILLNESS/INJURY LEAVE (continued)**

*45240-45320 Merit system, classified employees*

EVIDENCE CODE

*1035.2 Sex assault counselor; definition*

*1037.1 Domestic violence counselor; definition*

FAMILY CODE

*297-297.5 Registered domestic partner rights, protections, and benefits*

GOVERNMENT CODE

*3543.1 Release time for representatives of employee organizations*

*12945.1-12945.2 California Family Rights Act*

LABOR CODE

*230-230.2 Leave for victims of domestic violence, sexual assault, or specified felonies*

*230.3 Leave for emergency personnel*

*230.4 Leave for volunteer firefighters*

*230.8 Leave to visit child's school*

*233 Illness of child, parent, spouse, domestic partner or domestic partner's child*

*234 Absence control policy*

*246.5 Paid sick days, purposes for use*

*1500-1507 Civil Air Patrol leave*

MILITARY AND VETERANS CODE

*395.10 Leave when spouse on leave from military deployment*

PENAL CODE

*667.5 Violent felony, defined*

*1192.7 Serious felony, defined*

CALIFORNIA CONSTITUTION

*Article 1, Section 8 Religious discrimination*

UNITED STATES CODE, TITLE 29

*2601-2654 Family and Medical Leave Act*

UNITED STATES CODE, TITLE 42

*2000d-2000d-7 Title VII, Civil Rights Act of 1964*

COURT DECISIONS

*Rankin v. Commission on Professional Competence, (1988) 24 Cal.3d 167*

PUBLIC EMPLOYMENT RELATIONS BOARD DECISIONS

*Berkeley Council of Classified Employees v. Berkeley Unified School District, (2008) PERB Decision No. 1954*

*Management Resources:*

WEB SITES

*California Federation of Teachers: <http://www.cft.org>*

*California School Employees Association: <http://www.csea.com>*

*California Teachers Association: <http://www.cta.org>*

*Public Employment Relations Board: <http://www.perb.ca.gov>*

# CSBA Sample Administrative Regulation

Classified Personnel AR 4217.11(a)

## PRERETIREMENT PART-TIME EMPLOYMENT

When the Governing Board has adopted the reduced workload program, any classified employee may reduce his/her workload from full time to part time in accordance with applicable law, district regulations, and collective bargaining agreement.

Regulations allowing employees to reduce their workload include but are not limited to the following (Education Code 45139):

When so authorized, any classified employee who is a member of the Public Employees' Retirement System may reduce his/her workload from full time to part time without losing retirement benefits, if all of the following conditions are met: (Education Code 45139)

1. Employees must be 55 of age before they may reduce their workload. The employee shall have reached the age of 55 prior to the workload reduction.
2. The employees must shall have completed been employed full time in a classified position for at least 10 years of full-time service to the district, of which the immediately preceding five years were full-time employment.
3. Employees must have completed five years of full-time service immediately prior to requesting a reduction in workload.
- 4 3. The five years required in #3 must have passed without a break in service. During the period immediately preceding a request for reduction in workload, the employee shall have been employed full time in a classified position for a total of at least five years without a break in service.
- 5 4. The option of part-time employment option is available at the employee's request shall be exercised at the request of the employee and may can be revoked only with the mutual consent of the employee and the Governing Board district.
- 6 5. Employees will be paid a pro-rata share of their full-time salary. The employee shall be paid a salary that is the pro-rata share of the salary he/she would be earning had the employee not elected to exercise the option of part-time employment.
6. The employee shall retain all other rights and benefits as long as for which he/she makes the payments for them that would be required if he/she still worked full-time remained in full-time employment. The employee shall receive the same health benefits in the same manner as a full-time classified employee.

AR 4217.11(b)

**PRERETIREMENT PART-TIME EMPLOYMENT** (continued)

*(cf. 4154/4254/4354 - Health and Welfare Benefits)*

7. **The** minimum part-time employment shall be the equivalent of one-half of the number of **days hours** of service required by the employee's contract during **the his/her** final year of **full-time** service **in a full-time classified position**.
8. **The period of the reduced workload part-time employment shall not exceed five years.**
- ~~10~~ 9. The period of part-time employment shall not extend beyond the end of the school year during which the employee reaches his/her 70th birthday.

**Prior to the reduction of an employee's workload, the Superintendent or designee shall verify the employee's eligibility for the reduced workload program. (Government Code 20905)**

**The Superintendent or designee shall maintain the necessary records to separately identify each employee who participates in the reduced workload program. (Government Code 20905)**

*(cf. 3580 - District Records)*

**The district may allow any classified employee who is not eligible for the reduction of workload pursuant to Education Code 45139 to reduce his/her workload from full time to part time after determining that it is in the best interest of the district. In any such case, the Board shall specify the terms and conditions under which the reduction in workload shall take place.**

*Legal Reference:*

EDUCATION CODE

45139 *Reduced workload for classified employees*

GOVERNMENT CODE

20000-21703 *Public Employees' Retirement System, especially:*

20905 *Reduced workload program, classified employees*

53201 *Health and welfare benefits*

COURT DECISIONS

*Praiser v. Biggs Unified School District (2001) 87 Cal.App.4th 398*

*Management Resources:*

WEB SITES

*California Public Employees' Retirement System: <http://www.calpers.ca.gov>*

# CSBA Sample Board Policy

**Administrative and Supervisory Personnel**      BP 4312.1(a)

## CONTRACTS

The Governing Board recognizes the importance of **employing** qualified and competent individuals to **lead manage** district programs and to assist the Superintendent in coordinating efforts to achieve district goals and objectives. To that end, the Board may fill certificated administrative and supervisory positions and classified senior management positions on a contract basis.

*(cf. 0000 - Vision)*  
*(cf. 2121 - Superintendent's Contract)*  
*(cf. 4111/4211/4311 - Recruitment and Selection)*  
*(cf. 4300 - Administrative and Supervisory Personnel)*  
*(cf. 4313.2 - Demotion/Reassignment)*  
*(cf. 4314 - Transfers)*

The Board may offer a continuing contract of up to four years to any deputy, associate, or assistant superintendent; any certificated employee holding a position requiring a supervision or administration credential; or any senior manager of the classified service. (Education Code 35031, 44929.20)

Prior to entering into any such contract, the Board and Superintendent shall consider the financial impact of the contract on the district. The proposed contract shall also be reviewed by legal counsel to ensure that all legally required provisions are included in the contract and to address any potentially adverse obligations **to for** the district.

*(cf. 3460 - Financial Reports and Accountability)*

The Board **shall may** deliberate in the closed session of a regular meeting about the terms of an employment contract for a deputy, associate, or assistant superintendent; other certificated employee holding a position requiring a supervision or administration credential; or a senior manager of the classified service. **Discussions regarding salary, salary schedule, or other compensation may occur in the closed session of a regular meeting only between the Board and its designated representative(s), as permitted under Government Code 54957.6 (the "labor exception") for the purpose of reviewing the Board's position and/or instructing the designated representative(s) prior to or during bona fide negotiations with the employee. Such deliberations shall not be held during a special meeting.** (Government Code **54956, 54957, 54957.6**)

*(cf. 9320 - Meetings and Notices)*  
*(cf. 9321 - Closed Session Purposes and Agendas)*  
*(cf. 9321.1 - Closed Session Actions and Reports)*

BP 4312.1(b)

## CONTRACTS (continued)

~~Any such employment contract shall be ratified by the Board.~~ **The Board shall take final action on an employment contract** during an open session of a regularly scheduled Board meeting, **and that action shall be and** reflected in the Board's minutes. **At that meeting, prior to taking action, the Board shall orally report a summary of the recommendation for the final action on salary or compensation in the form of fringe benefits.** (Government Code **3511.1, 53262, 54953**)

Copies of ~~the any~~ **contracts and other public records created or received in the process of developing the recommendation related to the salary, benefits, and other compensation** shall be available to the public upon request. (Government Code 53262, **54953**)

*(cf. 1340 - Access to District Records)*

*(cf. 9322 - Agenda/Meeting Materials)*

*(cf. 9324 - Minutes and Recordings)*

### Extension of Contract/ ~~and~~ Reemployment

A contract shall be extended only by Board action and subsequent to a satisfactory evaluation of the employee's performance. No employment contract shall include a provision for automatic renewal of the contract.

*(cf. 4315 - Evaluation/Supervision)*

During the term of the contract and with the consent of the employee involved, the Board may reelect or reemploy the employee starting on the next succeeding first day of July and based on terms and conditions mutually agreed upon by the Board and the employee. (Education Code 35031)

If the Board decides not to reelect or reemploy a deputy, associate, or assistant superintendent or a senior manager of the classified service upon the expiration of his/her term, it shall notify the employee in writing 45 **calendar** days prior to the expiration of the term of the contract. (Education Code 35031)

*(cf. 4112.9/4212.9/4312.9 - Employee Notifications)*

### Termination of Contract

**The Board may terminate an employment contract prior to its expiration date in accordance with the conditions and process specified in the contract.**

Every employment contract shall include a provision specifying the legal maximum cash settlement that the employee may receive in the event that the **contract is terminated** ~~Board finds it necessary to terminate the contract~~ prior to its expiration date. (Government Code **3511.2, 53260**)

BP 4312.1(c)

**CONTRACTS** (continued)

(cf. 4117.5/4217.5/4317.5 - Termination Agreements)

In addition, all employment contracts shall include a provision that, if the employee is convicted of a crime involving an abuse of his/her office or position, he/she shall fully reimburse the district for payments he/she receives as paid leave salary pending investigation or as cash settlement upon his/her termination and for any funds expended by the district in his/her criminal legal defense. (Government Code 53243-53243.4, 53260)

*Legal Reference:*

EDUCATION CODE

35030 Title of deputy, associate or assistant superintendent for certain positions

35031 Term of employment

44842 Automatic declining of employment

44843 Notice of employment to county superintendent

44929.20 Continuing contract

44951 Continuation in position unless notified

GOVERNMENT CODE

3511.1-3511.2 Local agency executives

53260-53264 Employment contracts

**54953 Oral summary of recommended salary and benefits of district executive**

54954 Time and place of regular meetings

54956 Brown Act - Open meeting laws; special meetings

54957 Closed session, personnel matters

ATTORNEY GENERAL OPINIONS

**57 Ops.Cal.Atty.Gen. 209 (1974)**

*Management Resources:*

CSBA PUBLICATIONS

**Maximizing School Board Governance: The Board's Relationship to District Staff, 2007**

ATTORNEY GENERAL PUBLICATIONS

**The Brown Act: Open Meetings for Local Legislative Bodies, 2003**

WEB SITES

CSBA: <http://www.csba.org>

Association of California School Administrators: <http://www.acsa.org>

California Office of the Attorney General: <https://oag.ca.gov>

# CSBA Sample Board Policy

**Students** BP 5113.1(a)

## CHRONIC ABSENCE AND TRUANCY

The Governing Board believes that ~~excessive~~ absenteeism, ~~whether caused by excused or unexcused absences~~ **whatever the cause**, may be an early warning sign of poor academic achievement and may put students at risk of dropping out of school. The Board desires to ensure that all students attend school in accordance with the state's compulsory education law and take full advantage of educational opportunities provided by the district.

*(cf. 5113 - Absences and Excuses)*

*(cf. 5113.11 - Attendance Supervision)*

The Superintendent or designee shall establish a system to accurately track student attendance in order to identify individual students who are chronic absentees and truants, as defined in law and administrative regulation, and to identify patterns of absence throughout the district. He/she shall provide the Board with data on school attendance, chronic absence, and truancy rates **for all district students districtwide**, for each school, and **disaggregated** for each numerically significant student subgroup as defined in Education Code 52052. Such data shall be ~~disaggregated and~~ used in the development of annual goals and specific actions for student attendance and engagement ~~and for inclusion to be included~~ in the district's local control and accountability plan and other applicable school and district plans.

*(cf. 0400 - Comprehensive Plans)*

*(cf. 0420 - School Plans/Site Councils)*

*(cf. 0450 - Comprehensive Safety Plan)*

*(cf. 0460 - Local Control and Accountability Plan)*

*(cf. 0500 - Accountability)*

The Superintendent or designee shall develop strategies that focus on prevention of attendance problems, which may include, but are not limited to, efforts to provide a safe and positive school environment, relevant and engaging learning experiences, school activities that help develop students' feelings of connectedness with the school, school-based health services, and incentives and rewards to recognize students who achieve excellent attendance or demonstrate significant improvement in attendance. The Superintendent or designee also shall develop strategies that enable early outreach to students as soon as they show signs of poor attendance.

*(cf. 0410 - Nondiscrimination in District Programs and Activities)*

*(cf. 5126 - Awards for Achievement)*

*(cf. 5131 - Conduct)*

*(cf. 5131.2 - Bullying)*

*(cf. 5137 - Positive School Climate)*

*(cf. 5141.6 - School Health Services)*

*(cf. 5145.3 - Nondiscrimination/Harassment)*

BP 5113.1(b)

**CHRONIC ABSENCE AND TRUANCY (continued)**

The Superintendent or designee shall ~~work~~ **consult** with students, parents/guardians, school staff, and community agencies, as appropriate, to identify factors contributing to chronic absence and truancy.

**Interventions for students with serious attendance problems shall be designed to meet the specific needs of the student and may include, but are not limited to, health care referrals, transportation assistance, counseling for mental or emotional difficulties, academic supports, efforts to address school or community safety concerns, discussions with the student and parent/guardian about their attitudes regarding schooling, or other strategies to remove identified barriers to school attendance.** ~~He/she also~~ **The Superintendent or designee** may collaborate with child welfare services, law enforcement, courts, public health care agencies, other government agencies, and/or medical, mental health, and oral health care providers to ~~ensure that~~ **make** alternative educational programs and ~~nutrition, health care, and other~~ support services are available for students and families ~~and to intervene as necessary when students have serious attendance problems.~~

*(cf. 1020 - Youth Services)*  
*(cf. 5030 - Student Wellness)*  
*(cf. 5146 - Married/Pregnant/Parenting Students)*  
*(cf. 5147 - Dropout Prevention)*  
*(cf. 6158 - Independent Study)*  
*(cf. 6164.2 - Guidance/Counseling Services)*  
*(cf. 6164.5 - Student Success Teams)*  
*(cf. 6173 - Education for Homeless Children)*  
*(cf. 6173.1 - Education for Foster Youth)*  
*(cf. 6173.2 - Education of Children of Military Families)*  
*(cf. 6175 - Migrant Education Program)*  
*(cf. 6179 - Supplemental Instruction)*  
*(cf. 6181 - Alternative Schools/Programs of Choice)*  
*(cf. 6183 - Home and Hospital Instruction)*  
*(cf. 6184 - Continuation Education)*  
*(cf. 6185 - Community Day School)*

Students who are identified as truants shall be subject to the interventions specified in law and administrative regulation.

*(cf. 5113.12 - District School Attendance Review Board)*

A student's truancy, tardiness, or other absence from school shall not be the basis for his/her ~~out-of-school~~ suspension or expulsion. Alternative **disciplinary** strategies and positive reinforcement for attendance shall be used whenever possible.

*(cf. 5144 - Discipline)*  
*(cf. 5144.1 - Suspension and Expulsion/Due Process)*



BP 5113.1(c)

**CHRONIC ABSENCE AND TRUANCY (continued)**

The Superintendent or designee shall periodically report to the Board regarding the district's progress in improving student attendance rates for all students and for each numerically significant student population. Such information shall be used to evaluate the effectiveness of strategies implemented to reduce chronic absence and truancy and to make changes as needed. As appropriate, the Superintendent or designee shall engage school staff in program evaluation and improvement and in **identification the determination** of how to best allocate available community resources.

**[SECTION ON "SCHOOL ATTENDANCE REVIEW BOARD" DELETED]**

*Legal Reference:*

EDUCATION CODE

1740-~~1742~~ *Employment of personnel to supervise attendance (county superintendent)*

37223 *Weekend classes*

~~41601 *Reports of average daily attendance*~~

46000 *Records (attendance)*

46010-46014 *Absences*

46110-46119 *Attendance in kindergarten and elementary schools*

46140-46147 *Attendance in junior high and high schools*

48200-48208 *Children ages 6-18 (compulsory full-time attendance)*

48225.5 *Work permits, entertainment and allied industries*

48240-48246 *Supervisors of attendance*

48260-48273 *Truants*

48290-48297 *Failure to comply; complaints against parents*

48320-48325 *School attendance review boards*

48340-48341 *Improvement of student attendance*

48400-48403 *Compulsory continuation education*

48900 *Suspension and expulsion*

49067 *Unexcused absences as cause of failing grade*

52052 *Academic Performance Index; numerically significant student subgroups*

60901 *Chronic absence*

GOVERNMENT CODE

54950-54963 *The Ralph M. Brown Act*

PENAL CODE

270.1 *Chronic truancy; parent/guardian misdemeanor*

272 *Parent/guardian duty to supervise and control minor child; criminal liability for truancy*

830.1 *Peace officers*

VEHICLE CODE

13202.7 *Driving privileges; minors; suspension or delay for habitual truancy*

WELFARE AND INSTITUTIONS CODE

256-258 *Juvenile hearing officer*

601-601.4 *Habitually truant minors*

11253.5 *Compulsory school attendance*

CODE OF REGULATIONS, TITLE 5

306 *Explanation of absence*

420-421 *Record of verification of absence due to illness and other causes*

~~15497.5 *Local control and accountability plan template*~~

COURT DECISIONS

BP 5113.1(d)

## CHRONIC ABSENCE AND TRUANCY (continued)

*L.A. v. Superior Court of San Diego County, (2012) 209 Cal.App.4th 976*

### *Management Resources:*

#### CSBA PUBLICATIONS

*Attendance Awareness Month, Fact Sheet, September 2014*

#### ATTENDANCE WORKS PUBLICATIONS

*Count Us In! Working Together to Show that Every School Day Matters, 2014*

*The Power of Positive Connections: Reducing Chronic Absence Through PEOPLE: Priority Early Outreach for Positive Linkages and Engagement, 2014*

#### CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS

*School Attendance Review Board Handbook: **A Road Map for Improved School Attendance and Behavior.** 2015*

*School Attendance Improvement Handbook, 2000*

#### WEB SITES

CSBA: <http://www.csba.org>

Attendance Works: <http://www.attendanceworks.org>

California Association of Supervisors of Child Welfare and Attendance: <http://www.cascwa.org>

California Department of Education: <http://www.cde.ca.gov>

California Healthy Kids Survey: <http://chks.wested.org>

California School Climate, Health, and Learning Survey System: <http://www.cal-schls.wested.org>

# CSBA Sample Administrative Regulation

**Students** AR 5113.1(a)

## CHRONIC ABSENCE AND TRUANCY

### Definitions

*Chronic absentee* means a student who is absent for any reason on 10 percent or more of the school days in the school year, when the total number of days the student is absent is divided by the total number of days the student is enrolled and school was actually taught in the regular schools of the district, exclusive of Saturdays and Sundays. (Education Code 60901, ~~5 CCR 15497.5~~)

*Truant* means a student who is absent from school without a valid excuse three full days in one school year, or tardy or absent for more than any 30-minute period during the school day without a valid excuse on three occasions in one school year, or any combination thereof. (Education Code 48260)

*Habitual truant* means a student who has been reported as a truant three or more times within the same school year, provided the district has made a conscientious effort to hold at least one conference with the student and his/her parent/guardian **after either of the two previous reports**. (Education Code 48262, 48264.5)

*Chronic truant* means a student who has been absent from school without a valid excuse for 10 percent or more of the school days in one school year, from the date of enrollment to the current date, provided the district has met the requirements of Education Code 48260, ~~48263~~, **48260.5, 48261, 48262, 48263**, and 48291. (Education Code 48263.6)

For purposes of classifying a student as a truant, *valid excuse* includes, but is not limited to, the reasons for which a student shall be excused from school pursuant to Education Code 48205 and 48225.5. A valid excuse ~~also~~ may include other reasons that are within the discretion of school administrators and, based on the facts of the student's circumstances, are deemed to constitute a valid excuse. (Education Code 48260)

(cf. 5113 - Absences and Excuses)

(cf. 5113.2 - Work Permits)

### **Attendance Supervisor(s)**

Note: The following **optional** section may be revised to reflect district practice. Pursuant to Education Code 48240-48246, the district may appoint an attendance supervisor, join a consortium of districts to employ an attendance supervisor, or, with approval of the County Board of Education, contract with the County Superintendent of Schools to supervise the attendance of district students. The following section may be revised to specify which duties will be assumed by the attendance supervisor.

AR 5113.1(b)

### **CHRONIC ABSENCE AND TRUANCY (continued)**

~~The Superintendent or designee shall appoint or contract with a supervisor of attendance and assistant supervisors as necessary to supervise the attendance of district students. Such supervisors shall perform duties related to compulsory full-time education, truancy, compulsory continuation education, work permits, and any additional duties prescribed by the Superintendent. (Education Code 48240, 48243, 48244)~~

#### **Addressing Chronic Absence**

Note: The following **optional** section may be revised to reflect district practice.

For further information about strategies to address chronic absence, see CSBA's policy brief [Improving Student Achievement by Addressing Chronic Absence](#) and the California Department of Education's (CDE) [School Attendance Improvement Handbook](#). Also see AR 5113 - Absences and Excuses for language requiring students with frequent absences due to illness to provide written verification from a health care practitioner.

When a student is identified as a chronic absentee, the ~~attendance supervisor~~ **Superintendent or designee** shall communicate with the student and his/her parents/guardians to determine the reason(s) for the excessive absences, ensure the student and parents/guardians are aware of the adverse consequences of poor attendance, and jointly develop a plan for improving the student's school attendance.

*(cf. 5113.11 - Attendance Supervision)*  
*(cf. 6020 - Parent Involvement)*

The student may be referred to a student success team or school-site attendance review team to assist in evaluating his/her needs and identifying strategies and programs to assist him/her.

*(cf. 5146 - Married/Pregnant/Parenting Students)*  
*(cf. 5147 - Dropout Prevention)*  
*(cf. 6164.2 - Guidance/Counseling Services)*  
*(cf. 6164.5 - Student Success Teams)*  
*(cf. 6173 - Education for Homeless Children)*  
*(cf. 6173.1 - Education for Foster Youth)*  
*(cf. 6173.2 - Education of Children of Military Families)*  
*(cf. 6175 - Migrant Education Program)*

A student who is struggling academically may be offered tutoring or other supplemental instruction, extended learning opportunities, and/or alternative educational options as appropriate.

*(cf. 6158 - Independent Study)*  
*(cf. 6176 - Weekend/Saturday Classes)*  
*(cf. 6178.1 - Work-Based Learning)*

AR 5113.1(c)

### **CHRONIC ABSENCE AND TRUANCY (continued)**

*(cf. 6179 - Supplemental Instruction)*  
*(cf. 6181 - Alternative Schools/Programs of Choice)*  
*(cf. 6183 - Home and Hospital Instruction)*  
*(cf. 6184 - Continuation Education)*

Whenever chronic absenteeism is linked to a health issue or nonschool condition, the ~~attendance supervisor~~ **Superintendent or designee** may recommend school or community resources and/or collaborate with community agencies and organizations to address the needs of the student and his/her family.

*(cf. 1020 - Youth Services)*  
*(cf. 5141.6 - School Health Services)*

### **Addressing Truancy**

An attendance supervisor or designee, peace officer, probation officer, or school administrator or designee may, as applicable, arrest or assume temporary custody during school hours of any minor student found away from his/her home who is absent from school without a valid excuse. Any person arresting or assuming temporary custody of a minor student shall deliver the student and make reports in accordance with Education Code 48265 and 48266. (Education Code 48264, 48265, 48266)

*(cf. 3515.3 - District Police/Security Department)*

The ~~attendance supervisor~~ **Superintendent or designee** shall investigate a complaint from any person that a parent/guardian has violated the state compulsory education laws contained in Education Code 48200-48341. (Education Code 48290)

When a student has been identified as a truant as defined above, the following steps shall be implemented based on the number of trancies he/she has committed:

1. Initial truancy
  - a. The student shall be reported to the ~~attendance supervisor~~ **Superintendent or designee**. (Education Code 48260)
  - b. The student's parent/guardian shall be notified by the most cost-effective method possible, which may include email or a telephone call, that: (Education Code 48260.5)

AR 5113.1(d)

**CHRONIC ABSENCE AND TRUANCY** (continued)

- (1) The student is truant.
- (2) The parent/guardian is obligated to compel the student to attend school. If the parent/guardian fails to meet this obligation, he/she may be guilty of an infraction of the law and subject to prosecution pursuant to Education Code 48290-48296.
- (3) Alternative educational programs are available in the district.
- (4) The parent/guardian has the right to meet with appropriate school personnel to discuss solutions to the student's truancy.
- (5) The student may be subject to arrest or held in temporary custody by a probation officer, a peace officer, a school administrator **or designee**, or attendance supervisor or **his/her** designee **under pursuant to** Education Code 48264 if found away from home and absent from school without a valid excuse.
- (6) The student may be subject to suspension, restriction, or delay of his/her driving privilege pursuant to Vehicle Code 13202.7.
- (7) It is recommended that the parent/guardian accompany the student to school and attend classes with the student for one day.

*(cf. 5145.6 - Parental Notifications)*

- c. The student may be required to attend makeup classes on one day of a weekend pursuant to Education Code 37223. (Education Code 48264.5)
  - d. The student and, as appropriate, his/her parent/guardian may be requested to attend a meeting with a school counselor or other school designee to discuss the root causes of the attendance issue and develop a joint plan to improve the student's attendance. (Education Code 48264.5)
  - e. The ~~attendance supervisor~~ **Superintendent or designee** may notify the district attorney and/or probation officer of the student's name and the name and address of his/her parents/guardians. (Education Code 48260.6)
2. Second truancy
- a. Any student who has once been reported as a truant shall again be reported to the ~~attendance supervisor~~ **Superintendent or designee** as a truant if he/she is absent from school without a valid excuse one or more days or is tardy on one or more days during the school year. (Education Code 48261)

AR 5113.1(e)

**CHRONIC ABSENCE AND TRUANCY** (continued)

- b. The student may be required to attend makeup classes on one day of a weekend pursuant to Education Code 37223. (Education Code 48264.5)
- c. The student may be assigned to an after-school or weekend study program within the county. If the student fails to successfully complete this study program, he/she shall be subject to item #3 below. (Education Code 48264.5)
- d. An appropriate district staff member shall make a conscientious effort to hold at least one conference with the student and his/her parent/guardian by communicating with the parent/guardian at least once using the most cost-effective method possible, which may include email or a telephone call. (Education Code 48262)
- e. The student may be given a written warning by a peace officer. A record of that warning may be kept at the school for not less than two years or until the student graduates or transfers from the school. If the student transfers, the record may be forwarded to the new school. (Education Code 48264.5)
- f. The ~~attendance supervisor~~ **Superintendent or designee** may notify the district attorney and/or probation officer when the student continues to be classified as a truant after the parents/guardians have been notified in accordance with item #1b above. (Education Code 48260.6)

3. Third truancy (habitual truancy)

According to the CDE's School Attendance Improvement Handbook, prior to referring a truant student to a SARB or county truancy mediation program, some districts initiate an intermediate step, such as a school-site attendance review team or student success team. Districts that have established such an intermediate step may revise the following item accordingly.

AR 5113.1(g)

- a. A student who is habitually truant, irregular in school attendance, or habitually insubordinate or disorderly during attendance at school may be referred to, and required to attend, a school attendance review board (SARB) program, a truancy mediation program established by the district attorney or the probation officer, or a comparable program deemed acceptable by the ~~district's attendance supervisor~~ **Superintendent or designee**. (Education Code 48263, 48264.5)

*(cf. 5113.12 - District School Attendance Review Board)*

- b. Upon making a referral to the SARB or the probation department, the ~~attendance supervisor~~ **Superintendent or designee** shall provide the student and parent/guardian, in writing, the name and address of the SARB or probation department and the reason for the referral.

AR 5113.1(f)

**CHRONIC ABSENCE AND TRUANCY** (continued)

This notice shall indicate that the student and parent/guardian shall be required, along with the district staff person making the referral, to meet with the SARB or a probation officer to consider a proper disposition of the referral. (Education Code 48263)

- c. If the student does not successfully complete the truancy mediation program or other similar program, he/she shall be subject to item #4 below. (Education Code 48264.5)

The following paragraph is for use by districts in which the county has not established a SARB and the county's district attorney or probation officer has elected to participate in a truancy mediation program.

- d. If the ~~attendance supervisor~~ **Superintendent or designee** determines that available community services cannot resolve the problem of the truant or insubordinate student or if the student and/or his/her parents/guardians have failed to respond to the directives of the district or to services provided, the ~~attendance supervisor~~ **Superintendent or designee** may so notify the district attorney and/or the probation officer. (Education Code 48263)

4. Fourth truancy

- a. Upon his/her fourth truancy within the same school year, the student may be referred to the jurisdiction of the juvenile court. (Education Code 48264.5; Welfare and Institutions Code 601)
- b. If a student has been adjudged by the county juvenile court to be a habitual truant, the ~~attendance supervisor~~ **Superintendent or designee** shall notify the juvenile court and the student's probation or parole officer whenever the student is truant or tardy on one or more days without a valid excuse in the same or succeeding school year, or is habitually insubordinate or disorderly at school. The juvenile court and probation or parole officer shall be notified within 10 days of the violation. (Education Code 48267)

5. **Chronic truancy (unexcused a** Absence for 10 percent of school days **(chronic truancy)**

- a. The ~~attendance supervisor~~ **Superintendent or designee** shall ensure that the student's parents/guardians are offered language-accessible support services to address the student's truancy.
- b. If a chronically truant student is at least age six years and is in any of grades K-8, the ~~attendance supervisor~~ **Superintendent or designee** shall notify the student's parents/guardians that failure to reasonably supervise and encourage the student's school attendance may result in the parent/guardian being found guilty of a misdemeanor pursuant to Penal Code 270.1.

AR 5113.1(i)



AR 5113.1(g)

**CHRONIC ABSENCE AND TRUANCY** (continued)

**Records**

The Superintendent or designee shall maintain accurate attendance records for students identified as habitual or chronic truants. The Superintendent or designee also shall document all contacts with a student and his/her parent/guardian regarding the student's attendance, including a summary of all conversations and a record of all intervention efforts.

*(cf. 5125 - Student Records)*

Note: Education Code 48273 **mandates** that the district adopt rules and regulations for the purpose of gathering data and making a report to the County Superintendent of Schools regarding SARB referrals. The CDE's web site provides a model annual summary report form.

The Superintendent or designee shall gather and transmit to the County Superintendent of Schools the number and types of referrals made to the SARB and of requests for petitions made to the juvenile court. (Education Code 48273)

# CSBA Sample Administrative Regulation

Students AR 5113.11(a)

## ATTENDANCE SUPERVISION

The Superintendent or designee shall appoint an attendance supervisor and any assistant attendance supervisor(s) as may be necessary to supervise the attendance of district students. (Education Code 48240)

The Superintendent or designee shall ensure that any person appointed as an attendance supervisor has been certificated for the work by the County Board of Education. (Education Code 48241, 48245)

Such supervisors shall perform duties related to compulsory full-time education, truancy, compulsory continuation education, work permits, and any additional duties prescribed by the Superintendent or designee. (Education Code 48240)

*(cf. 5112.1 - Exemptions from Attendance)*

*(cf. 5113 - Absences and Excuses)*

*(cf. 5113.1 - Chronic Absence and Truancy)*

*(cf. 5113.2 - Work Permits)*

*(cf. 6184 - Continuation Education)*

Note: Items #1-5 below may be revised to reflect district practice. Education Code 48240, as amended by AB 2815 (Ch. 829, Statutes of 2016), states the Legislature's intent that attendance supervisors fulfill the following duties.

The attendance supervisor shall promote a culture of attendance and establish a system to accurately track student attendance in order to achieve all of the following: (Education Code 48240)

1. Raise the awareness of school personnel, parents/guardians, caregivers, community partners, and local businesses of the effects of chronic absenteeism and truancy and other challenges associated with poor attendance
2. Identify and respond to grade level or student subgroup patterns of chronic absenteeism or truancy

*(cf. 5146 - Married/Pregnant/Parenting Students)*

*(cf. 6173 - Education for Homeless Children)*

*(cf. 6173.1 - Education for Foster Youth)*

*(cf. 6173.2 - Education of Children of Military Families)*

*(cf. 6175 - Migrant Education Program)*

AR 5113.11(b)

**ATTENDANCE SUPERVISION** (continued)

- 3. Identify and address factors contributing to chronic absenteeism and habitual truancy, including suspension and expulsion**

*(cf. 5144.1 - Suspension and Expulsion/Due Process)*

*(cf. 5144.2 - Suspension and Expulsion/Due Process (Students with Disabilities))*

- 4. Ensure that students with attendance problems are identified as early as possible to provide applicable support services and interventions**

- 5. Evaluate the effectiveness of strategies implemented to reduce chronic absenteeism rates and truancy rates**

*(cf. 0500 - Accountability)*

The attendance supervisor may provide support services and interventions, including, but not limited to, the following: (Education Code 48240)

- 1. A conference between school personnel, the student's parent/guardian, and the student**
- 2. Promotion of cocurricular and extracurricular activities that increase student connectedness to school, such as tutoring, mentoring, the arts, service learning, or athletics**

*(cf. 6142.4 - Service Learning/Community Service Classes)*

*(cf. 6142.6 - Visual and Performing Arts)*

*(cf. 6145 - Extracurricular and Cocurricular Activities)*

*(cf. 6145.2 - Athletic Competition)*

- 3. Recognition of students who achieve excellent attendance or demonstrate significant improvement in attendance**

*(cf. 5126 - Awards for Achievement)*

- 4. Referral of the student to a school nurse, school counselor, school psychologist, school social worker, and other student support personnel for case management and counseling**

*(cf. 5141.6 - School Health Services)*

*(cf. 6164.2 - Guidance/Counseling Services)*

- 5. Collaboration with child welfare services, law enforcement, courts, public health care agencies, government agencies, or medical, mental health, and oral health care providers to receive necessary services**

*(cf. 1020 - Youth Services)*

AR 5113.11(c)

**ATTENDANCE SUPERVISION** (continued)

- 6. Collaboration with school study teams, guidance teams, school attendance review teams, or other intervention-related teams to assess the attendance or behavior problem in partnership with the student and his/her parents/guardians or caregivers**

*(cf. 6164.5 - Student Success Teams)*

- 7. In schools with significantly higher rates of chronic absenteeism, identification of barriers to attendance that may require schoolwide strategies rather than case management**

- 8. Referral of the student for a comprehensive psychosocial or psychoeducational assessment, including for purposes of creating an individualized education program for a student with disabilities or creating a plan pursuant to Section 504 of the federal Rehabilitation Act of 1973**

*(cf. 6159 - Individualized Education Program)*

*(cf. 6164.6 - Identification and Education Under Section 504)*

- 9. Referral of the student to a school attendance review board established pursuant to Education Code 48321 or to the probation department pursuant to Education Code 48263**

*(cf. 5113.12 - District School Attendance Review Board)*

- 10. Referral of the student to a truancy mediation program operated by the county's district attorney or probation officer pursuant to Education Code 48260.6**

**The attendance supervisor shall annually report student attendance data to the Superintendent or designee and the Governing Board. Such data shall include, by school, grade level, and each numerically significant student subgroup as defined in Education Code 52052, rates of school attendance, chronic absence in which students are absent on 10 percent or more of the school days in the school year, and dropout.**

*(cf. 5147 - Dropout Prevention)*

**Legal Reference:**

**EDUCATION CODE**

**1740 Employment of personnel to supervise attendance (county superintendent)**

**37223 Weekend classes**

**46000 Records (attendance)**

**46010-46014 Absences**

**46110-46119 Attendance in kindergarten and elementary schools**

**46140-46147 Attendance in junior high and high schools**

**48200-48208 Children ages 6-18 (compulsory full-time attendance)**

**48240-48246 Supervisors of attendance**

**48260-48273 Truants**

**48290-48297 Failure to comply; complaints against parents**

AR 5113.11(d)

**ATTENDANCE SUPERVISION (continued)**

**48320-48325 School attendance review boards**

**48340-48341 Improvement of student attendance**

**48400-48403 Compulsory continuation education**

**52060-52077 Local control and accountability plan**

**60901 Chronic absence**

**PENAL CODE**

**270.1 Chronic truancy; parent/guardian misdemeanor**

**WELFARE AND INSTITUTIONS CODE**

**601-601.4 Habitually truant minors**

**11253.5 Compulsory school attendance**

**CODE OF REGULATIONS, TITLE 5**

**306 Explanation of absence**

**420-421 Record of verification of absence due to illness and other causes**

**Management Resources:**

**CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS**

**School Attendance Review Board Handbook, 2015**

**School Attendance Improvement Handbook, 2000**

**WEB SITES**

**CSBA: <http://www.csba.org>**

**Attendance Works: <http://www.attendanceworks.org>**

**California Association of Supervisors of Child Welfare and Attendance: <http://www.cascwa.org>**

**California Department of Education: <http://www.cde.ca.gov>**

# CSBA Sample Board Policy

Students BP 5113.12(a)

## DISTRICT SCHOOL ATTENDANCE REVIEW BOARD

The Governing Board recognizes that poor school attendance and behavior problems negatively impact student achievement and put students at greater risk of dropping out of school. The Superintendent or designee shall establish a comprehensive and integrated system for the early identification of attendance problems and shall implement strategies to encourage students' attendance. After other interventions have been exhausted, students with a pattern of unexcused absences may be referred to a school attendance review board (SARB), in accordance with applicable law, in order to receive intensive guidance and assistance.

*(cf. 5113 - Absences and Excuses)*  
*(cf. 5113.1 - Chronic Absence and Truancy)*  
*(cf. 5113.11 - Attendance Supervision)*  
*(cf. 5147 - Dropout Prevention)*

The SARB shall maintain a continuing inventory of community resources, including alternative educational programs.

The Superintendent or designee shall collaborate with the SARB and appropriate community agencies, including, but not limited to, law enforcement agencies, child welfare agencies, and health services, to provide school-based and/or community-based interventions tailored to the specific needs of the student.

*(cf. 1020 - Youth Services)*  
*(cf. 5030 - Student Wellness)*  
*(cf. 5126 - Awards for Achievement)*  
*(cf. 5131 - Conduct)*  
*(cf. 5131.2 - Bullying)*  
*(cf. 5137 - Positive School Climate)*  
*(cf. 5141.6 - School Health Services)*  
*(cf. 5145.3 - Nondiscrimination/Harassment)*  
*(cf. 5146 - Married/Pregnant/Parenting Students)*  
*(cf. 6158 - Independent Study)*  
*(cf. 6164.2 - Guidance/Counseling Services)*  
*(cf. 6164.5 - Student Success Teams)*  
*(cf. 6173 - Education for Homeless Children)*  
*(cf. 6173.1 - Education for Foster Youth)*  
*(cf. 6173.2 - Education of Children of Military Families)*  
*(cf. 6175 - Migrant Education Program)*  
*(cf. 6179 - Supplemental Instruction)*  
*(cf. 6181 - Alternative Schools/Programs of Choice)*  
*(cf. 6183 - Home and Hospital Instruction)*  
*(cf. 6184 - Continuation Education)*

BP 5113.12(b)

**DISTRICT SCHOOL ATTENDANCE REVIEW BOARD (continued)**

*(cf. 6185 - Community Day School)*

The Board shall appoint members to the district's SARB, who may include a parent/guardian as well as representatives of various agencies including, but not limited to, school districts; the county probation department; the county welfare department; the County Superintendent of Schools; law enforcement agencies; community-based youth service centers; school guidance personnel; child welfare and attendance personnel; school or county health care personnel; school, county, or community mental health personnel; the county district attorney's office; and the county public defender's office. (Education Code 48321)

The district's SARB shall provide support to improve student attendance and behavior through proactive efforts focused on building positive school environments and improved school connectedness, early identification and immediate intervention to re-engage students with poor attendance or behavior, and intensive intervention with students and families to address severe or persistent attendance or behavior issues.

The district's SARB shall operate in accordance with Education Code 48320-48325, the Brown Act (Government Code 54950-54963), and the bylaws of the SARB.

The SARB shall collect data and annually report outcomes on SARB referrals to the Governing Board, Superintendent or designee, and County Superintendent of Schools. (Education Code 48273)

***Legal Reference:***

**EDUCATION CODE**

***1740 Employment of personnel to supervise attendance (county superintendent)***

***1980-1986 County community school***

***46010-46014 Absences***

***48200-48208 Children ages 6-18 (compulsory full-time attendance)***

***48240-48246 Supervisors of attendance***

***48260-48273 Truants***

***48290-48297 Failure to comply; complaints against parents***

***48320-48325 School attendance review boards***

***48340-48341 Improvement of student attendance***

***48400-48403 Compulsory continuation education***

***48660-48666 Community day school***

***49067 Unexcused absences as cause of failing grade***

**CODE OF CIVIL PROCEDURE**

***1985-1997 Production of evidence; means of production***

**GOVERNMENT CODE**

***54950-54963 The Ralph M. Brown Act***

**PENAL CODE**

***270.1 Chronic truancy; parent/guardian misdemeanor***

BP 5113.12(c)

**DISTRICT SCHOOL ATTENDANCE REVIEW BOARD (continued)**

*272 Parent/guardian duty to supervise and control minor child; criminal liability for truancy*

*830.1 Peace officers*

**VEHICLE CODE**

*13202.7 Driving privileges; minors; suspension or delay for habitual truancy*

**WELFARE AND INSTITUTIONS CODE**

*256-258 Juvenile hearing officer*

*601-601.4 Habitually truant minors*

*11253.5 Compulsory school attendance*

**CODE OF REGULATIONS, TITLE 5**

*306 Explanation of absence*

*420-421 Record of verification of absence due to illness and other causes*

**COURT DECISIONS**

*L.A. v. Superior Court of San Diego County, (2012) 209 Cal.App.4th 976*

**Management Resources:**

**CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS**

*School Attendance Review Board Handbook: A Road Map for Improved School Attendance and Behavior, 2015*

*School Attendance Improvement Handbook, 2000*

**WEB SITES**

*CSBA: <http://www.csba.org>*

*Attendance Works: <http://www.attendanceworks.org>*

*California Association of Supervisors of Child Welfare and Attendance: <http://www.cascwa.org>*

*California Department of Education: <http://www.cde.ca.gov>*



# CSBA Sample Administrative Regulation

Students AR 5113.12(a)

## DISTRICT SCHOOL ATTENDANCE REVIEW BOARD

Upon receiving a referral of a student with attendance and/or behavior problems, a designated member of the school attendance review board (SARB) shall review the case and may meet with school personnel to determine whether the school has provided sufficient information about the student's attendance record or behavior. If the referral is complete and is an appropriate matter for the SARB to consider, the SARB chairperson shall provide written notification to the student's parents/guardians stating the reasons a referral has been made, explaining the SARB process, advising whether additional information is needed, and describing school-level interventions that have previously been attempted.

The SARB shall meet with the student and his/her parents/guardians, give them an opportunity to present their understanding of the problem, and discuss the school and/or community resources appropriate for the student's circumstances.

Note: The CDE's School Attendance Review Board Handbook clarifies that SARBs are subject to the open meeting requirements of the Brown Act (Government Code 54950-54963), including notice requirements, but that meetings may be held in closed session when considering matters related to individual students.

Any SARB meeting to consider matters related to an individual student shall be held in closed session unless the parent/guardian requests, in writing, that the meeting be held in open session.

*(cf. 9321 - Closed Session Purposes and Agendas)*

The SARB shall have access to relevant student records, but shall not provide access to others without written consent of the student's parent/guardian. (Education Code 49076)

*(cf. 5125 - Student Records)*

For the limited purpose of making a proper disposition of the referral of a student, the SARB may issue subpoenas pursuant to Code of Civil Procedure 1985-1997 or may request the juvenile court to issue subpoenas to require the attendance of the student, parents/guardians or other person having control of the student, the school authority referring the student, or any other person who has pertinent or material information concerning the matter. The SARB shall not issue any subpoena that includes a request for production of written materials, but may request a juvenile court to issue such subpoena for the production of written materials. (Education Code 48263, 48321.5)

Students AR 5113.12(b)

**DISTRICT SCHOOL ATTENDANCE REVIEW BOARD (continued)**

**The SARB shall issue written directives stating the responsibilities of all persons involved, detailed resource referrals, and follow-up dates for the school's reports on the student's progress. The written directives shall include an agreement that the student will attend school or improve classroom behavior as applicable, and shall be signed by the student, his/her parents/guardians, the SARB chairperson, and the Superintendent or designee.**

**When referred by the SARB, a student may be assigned to a community day school or a county community school. (Education Code 1981, 48662)**

*(cf. 6185 - Community Day School)*

**At any time it deems proper, the SARB may require the student or his/her parents/guardians to furnish satisfactory evidence of participation in any available community services that the student or parents/guardians have been directed to use. (Education Code 48263)**

**Based on progress reports submitted by the school, the SARB may terminate the agreement upon the successful completion of the terms of the agreement, extend the time for completion of the agreement, or schedule another meeting with the student and his/her parents/guardians.**

**If the student's attendance or behavior problems cannot be resolved by the SARB, or if the student and/or the student's parents/guardians continually and willfully fail to respond to SARB directives or the services provided, the student or parents/guardians shall be referred to the appropriate agency, including law enforcement agencies when necessary. (Education Code 48263, 48290-48291)**

# CSBA Sample Board Policy

Students BP 5117(a)

## INTERDISTRICT ATTENDANCE

The Governing Board recognizes that parents/guardians of students who reside **within the geographic boundaries of** ~~in~~ one district may, for a variety of reasons, **choose desire** to enroll their children **ren** in a school in another district.

*(cf. 0520.3 – Title I Program Improvement Districts)*

*(cf. 5111.1 - District Residency)*

*(cf. 5116.1 - Intradistrict Open Enrollment)*

*(cf. 5118 - Open Enrollment Act Transfers)*

### OPTION 1: Interdistrict Attendance Permits.

The Board may enter into an agreement with any other school district, for a term not to exceed five school years, for the interdistrict attendance of students who are residents of the districts. (Education Code 46600)

The agreement shall specify the terms and conditions under which interdistrict attendance shall be permitted or denied. It also may contain standards agreed to by both districts for reapplication and/or revocation of the student's permit. (Education Code 46600)

Upon receiving a permit for transfer into the district that has been approved by the student's district of residence, or upon receiving a written request from the parent/guardian of a district student who wishes to enroll in another district, the Superintendent or designee shall review the request and may approve or deny the permit subject to the terms and conditions of the interdistrict attendance agreement.

### Transportation

The district shall not provide transportation beyond any school attendance area. Upon request **of a student's parent/guardian**, the Superintendent or designee may authorize transportation for **an** interdistrict transfer students to and from designated bus stops within the attendance area **of the school that the student attends** if space is available.

**[SECTION ON "TRANSFERS OUT OF THE DISTRICT" MOVED TO AR]**

*Legal Reference: (see next page)*

BP 5117(b)

**INTERDISTRICT ATTENDANCE (continued)**

*Legal Reference:*

EDUCATION CODE

41020 Annual district audits

46600-46611 Interdistrict attendance agreements

48204 Residency requirements for school attendance

48300-~~48316~~ **48317** Student attendance alternatives, school district of choice program

48350-48361 Open Enrollment Act

48900 Grounds for suspension or expulsion; definition of bullying

48915 Expulsion; particular circumstances

48915.1 Expelled individuals: enrollment in another district

48918 Rules governing expulsion procedures

48980 Notice at beginning of term

52317 Regional occupational center/program, enrollment of students, interdistrict attendance

CALIFORNIA CONSTITUTION

**Article I, Section 31 Nondiscrimination on the basis of race, sex, color, ethnicity, or national origin**

ATTORNEY GENERAL OPINIONS

87 Ops.Cal.Atty.Gen. 132 (2004)

84 Ops.Cal.Atty.Gen. 198 (2001)

COURT DECISIONS

Walnut Valley Unified School District v. the Superior Court of Los Angeles County, (2011) 192

Cal.App.4th 234

Crawford v. Huntington Beach Union High School District, (2002) 98 Cal.App.4th 1275

*Management Resources:*

CSBA PUBLICATIONS

Transfer Law Comparison, Fact Sheet, March 2011

WEB SITES

CSBA: <http://www.csba.org>

California Department of Education: <http://www.cde.ca.gov>

# CSBA Sample Administrative Regulation

**Students** AR 5117(a)

## INTERDISTRICT ATTENDANCE

### Interdistrict Attendance Permits

In accordance with an agreement between the Governing Board and the board of another district, a permit authorizing a student's attendance outside his/her district of residence may be issued upon approval of both the district of residence and the district of proposed attendance.

The Superintendent or designee may approve an interdistrict attendance permit for a student for any of the following reasons when stipulated in the agreement:

1. When the student has been determined by staff of either the district of residence or district of proposed attendance to be a victim of an act of bullying as defined in Education Code 48900(r). Such a student shall be given priority for interdistrict attendance under any existing interdistrict attendance agreement or, in the absence of an agreement, shall be given consideration for the creation of a new permit. (Education Code 46600)

*(cf. 5131.2 - Bullying)*

2. To meet the child care needs of the student. Such a student may be allowed to continue to attend district schools only as long as he/she continues to use a child care provider within district boundaries.

***(cf. 5148 - Child Care and Development)***

3. To meet the student's special mental or physical health needs as certified by a physician, school psychologist, or other appropriate school personnel.

*(cf. 6159 - Individualized Education Program)*

4. When the student has a sibling attending school in the receiving district, to avoid splitting the family's attendance.
5. To allow the student to complete a school year when his/her parents/guardians have moved out of the district during that year.
6. To allow the student to remain with a class graduating that year from an elementary, middle, or senior high school.

AR 5117(b)

**INTERDISTRICT ATTENDANCE (continued)**

7. To allow a high school senior to attend the same school he/she attended as a junior, even if his/her family moved out of the district during the junior year.
8. When the parent/guardian provides written evidence that the family will be moving into the district in the immediate future and would like the student to start the year in the district.
9. When the student will be living out of the district for one year or less.
10. When recommended by the school attendance review board or by county child welfare, probation, or social service agency staff in documented cases of serious home or community problems which make it inadvisable for the student to attend the school of residence.

*(cf. 5113.1 - Chronic Absence and Truancy)*

***(cf. 5113.12 - District School Attendance Review Board)***

11. When there is valid interest in a particular educational program not offered in the district of residence.
12. To provide a change in school environment for reasons of personal and social adjustment.

The Superintendent or designee may deny initial requests for interdistrict attendance permits due to limited district resources, overcrowding of school facilities at the relevant grade level, or other considerations that are not arbitrary. However, once a student is admitted, the district may not deny him/her continued attendance because of overcrowded facilities at the relevant grade level.

*(cf. 0410 - Nondiscrimination in District Programs and Activities)*

Within 30 **calendar** days of a request for an interdistrict permit, the Superintendent or designee shall notify the parents/guardians of a student who is denied interdistrict attendance regarding the process for appeal to the County Board of Education as specified in Education Code 46601. (Education Code 46601)

*(cf. 5145.6 - Parental Notifications)*

Pending a decision by the two districts or an appeal by the County Board, the Superintendent or designee may provisionally admit a student who resides in another district for a period not to exceed two school months. (Education Code 46603)

Students who are under consideration for expulsion or who have been expelled may not appeal interdistrict attendance denials or decisions while expulsion proceedings are pending or during the term of the expulsion. (Education Code 46601)

AR 5117(c)

### **INTERDISTRICT ATTENDANCE (continued)**

*(cf. 5119 - Students Expelled from Other Districts)*  
*(cf. 5144.1 - Suspension and Expulsion/Due Process)*

Once a student is admitted to a school on the basis of an interdistrict attendance permit, he/she shall not be required to reapply for an interdistrict transfer and shall be allowed to continue to attend the school in which he/she is enrolled, unless reapplication standards are otherwise specified in the interdistrict attendance agreement. Existing interdistrict attendance permits shall not be rescinded for students entering grade 11 or 12 in the subsequent school year. (Education Code 46600)

#### **Limits on Student Transfers Out of the District to a School District of Choice**

A child of an active military duty student whose parent/guardian is in active military duty shall not be prohibited from transferring out of the district, to a school district of choice, if provided the other school district of proposed enrollment approves the application for transfer. (Education Code 46600, 48301 48307)

**The district may limit transfers out of the district to a school district of choice under any of the following circumstances: (Education Code 48307)**

1. The Superintendent or designee may limit the number of student transfers out of the district to a school district of choice based on **has reached the limit the percentages of average daily attendance specified in Education Code 48307 based on the district's average daily attendance.**
2. In addition, transfers out of the district may be limited during a fiscal year when ~~the~~ **The County Superintendent of Schools has given the district a negative budget certification or when the County Superintendent has determined that the district will not meet the state's standards and criteria for fiscal stability in the subsequent fiscal year exclusively as a result of student transfers from this district to a school district of choice. (Education Code 48307)**

*(cf. 3100 - Budget)*  
*(cf. 3460 - Financial Reports and Accountability)*

A child of an active military duty parent/guardian shall not be prohibited from transferring out of the district to a school district of choice, if the other school district approves the application for transfer. **(Education Code 48301)**

*(cf. 6173.2 - Education of Children of Military Families)*

# CSBA Sample Board Policy

Students BP 5131.6(a)

## ALCOHOL AND OTHER DRUGS

The Governing Board believes that the use of alcohol or other drugs adversely affects a student's ability to achieve academic success, is physically and emotionally harmful, and has serious social and legal consequences. ~~The Board desires to keep district schools free of alcohol and other drugs in order to help prevent violence, promote school safety and create a well-disciplined environment conducive to learning.~~ **The Superintendent or designee shall develop comprehensive programs and activities to foster safe, healthy, and drug-free environments that support academic achievement.**

*(cf. 0450 - Comprehensive Safety Plan)*

*(cf. 4020 - Drug and Alcohol-Free Workplace)*

*(cf. 5137 - Positive School Climate)*

**The district's alcohol and drug prevention and intervention programs shall be coordinated with other school and community-based services and programs and shall promote the involvement of parents/guardians. The Superintendent or designee may collaborate with the county office of education, community-based organizations, health providers, law enforcement agencies, local child welfare agencies, postsecondary institutions, businesses, and other public and private entities in program planning, implementation, and evaluation.**

*(cf. 1020 - Youth Services)*

*(cf. 1220 - Citizen Advisory Committees)*

*(cf. 6020 - Parent Involvement)*

~~The Superintendent or designee shall develop, implement and evaluate a comprehensive prevention and intervention program that is coordinated with other school and community-based services and programs. The district's program shall be scientifically based and designed to prevent or reduce alcohol or other drug use and the possession and distribution of illegal drugs. It shall include primary prevention activities such as decision making skills and conflict management, instruction, referral to a rehabilitation program, enforcement/discipline, activities that promote the involvement of parents/guardians and coordination with appropriate community agencies and organizations.~~

**Prevention and intervention programs and activities may include, but are not limited to: (20 USC 7118)**

- Evidence-based drug and violence prevention activities and programs that educate students against the use of alcohol, tobacco, cannabis, smokeless tobacco products, and electronic cigarettes**

*(cf. 5131.62 - Tobacco)*



BP 5131.6(b)

**ALCOHOL AND OTHER DRUGS (continued)**

- 2. Professional development and training for school staff, specialized instructional support personnel, and interested community members on drug prevention, education, early identification, intervention mentoring, recovery support services, and, where appropriate, rehabilitation referral**

*(cf. 4131 - Staff Development)*

*(cf. 4231 - Staff Development)*

*(cf. 4331 - Staff Development)*

- 3. School-based mental health services, including early identification of drug use and referrals to counseling services, and/or partnerships with public or private health care entities that have qualified mental and behavioral health professionals**

*(cf. 5141.6 - School Health Services)*

- 4. Programs and activities that provide mentoring and school counseling to all students, including students who are at risk of drug use and abuse**

The Board and Superintendent shall agree upon performance measures that will be used to monitor and determine the effectiveness of the district's programs in reducing drug and alcohol use. The Superintendent or designee shall develop and implement an evaluation process that includes ongoing assessment and analysis of objective data regarding the incidence of drug and alcohol use among district students, including discipline problems, and the prevalence of risk factors.

The Superintendent or designee shall clearly communicate to all students, staff, and parents/guardians the district's policies, regulations, and school rules related to the use of \*alcohol and other drugs on school campuses or at school activities. Information about program needs and goals shall be widely distributed in the community.

*(cf. 5131.61 - Drug Testing)*

*(cf. 5131.62 - Tobacco)*

*(cf. 5131.63 - Steroids)*

Staff should encourage students to participate as responsible partners in efforts to maintain a safe, constructive school climate.

*(cf. 5137 - Positive School Climate)*

The Board encourages the establishment of site-level advisory groups to assist in promoting alcohol and drug-free schools.

*(cf. 1220 - Citizen Advisory Committees)*

BP 5131.6(c)

## ALCOHOL AND OTHER DRUGS (continued)

~~The district's drug education program shall augment county drug education services, if any. District staff shall take every opportunity to cooperate with county and county office of education staff in planning and implementing collaborative alcohol and drug prevention programs.~~

~~(cf. 1020 - Youth Services)~~

~~(cf. 1400 - Relations Between Other Governmental Agencies and the Schools)~~

The Board and Superintendent shall agree upon performance measures that will be used to monitor and determine the effectiveness of the district's programs in reducing drug and alcohol use. The Superintendent or designee shall develop and implement an evaluation process that includes ongoing assessment and analysis of objective data regarding the incidence of drug and alcohol use among district students, including discipline problems, and the prevalence of risk factors.

### Instruction

The district shall provide science-based preventative instruction which has been proven effective in helping students avoid the use of alcohol and other drugs.

~~(cf. 6142.1 - Sexual Health and HIV/AIDS Prevention Instruction)~~

~~(cf. 6142.8 - Comprehensive Health Education)~~

~~(cf. 6143 - Courses of Study)~~

All instruction and related materials shall consistently state that unlawful use of alcohol or other drugs is ~~wrong and harmful~~ **prohibited**. Instruction shall not include ~~the concept of any message on~~ responsible use of drugs or alcohol when such use is illegal. (~~20 USC 7114, 7162~~; Health and Safety Code 11999.2)

The district shall offer staff development activities for staff who implement the comprehensive drug and alcohol prevention and intervention program.

~~(cf. 4131 - Staff Development)~~

### Intervention, Referral, and Student Assistance Programs

~~The Superintendent or designee shall inform s~~ School staff, students, and parents/guardians ~~shall be informed~~ about early warning signs which may indicate alcohol and other drug use and about appropriate agencies offering intervention programs, counseling, referral, and other student assistance programs.

The Board strongly encourages any student who is using alcohol or drugs to discuss the matter with his/her parent/guardian or with any staff member. Students who disclose their use of alcohol or other drugs when seeking help from an intervention or recovery program shall not be disciplined for such use.

~~(cf. 5141.52 - Suicide Prevention)~~

BP 5131.6(d)

## ALCOHOL AND OTHER DRUGS (continued)

### Enforcement/Discipline

~~The Superintendent or designee shall take appropriate action to eliminate~~ **Students shall not possession, use, or sale of sell alcohol and or** other drugs and related paraphernalia on school grounds or at school-sponsored activities.

*(cf. 3513.3 - Tobacco-Free Schools)*

*(cf. 3513.4 - Drug and Alcohol Free Schools)*

*(cf. 5131 - Conduct)*

*(cf. 5131.61 - Drug Testing)*

*(cf. 5131.63 - Steroids)*

*(cf. 5145.11 - Questioning and Apprehension by Law Enforcement)*

*(cf. 5145.12 - Search and Seizure)*

The Superintendent or designee shall clearly communicate to all students, staff, and parents/guardians the district's policies, regulations, and school rules related to the use of alcohol and other drugs.

~~Students possessing, using or selling alcohol or other drugs or related paraphernalia shall be subject to disciplinary procedures including suspension or expulsion and/or referral to law enforcement in accordance with law, Board policy and administrative regulation. In addition, such students may be referred to an appropriate counseling program, transferred to an alternative placement, and/or be restricted from extracurricular activities, including athletics~~

**Any student found selling a controlled substance listed in Health and Safety Code 11053-11058 shall be expelled in accordance with BP/AR 5144.1 - Suspension and Expulsion/Due Process. A student found to have committed another drug or alcohol offense, including possession or intoxication, shall be referred to appropriate behavioral interventions or student assistance programs, and may be subject to discipline on a case-by-case basis.**

*(cf. 5144 - Discipline)*

*(cf. 5144.1 - Suspension and Expulsion/Due Process)*

*(cf. 6145 - Extracurricular and Cocurricular Activities)*

### Program Evaluation

~~The Board and Superintendent shall agree upon performance measures that will be used to monitor and determine the effectiveness of the district's programs in reducing drug and alcohol use. The Superintendent or designee shall develop and implement an evaluation process that includes ongoing assessment and analysis of objective data regarding the incidence of drug and alcohol use among district students, including discipline problems, and the prevalence of risk factors.~~ **periodically report to the Board on the effectiveness of district activities in achieving identified objectives and outcomes. (20 USC 7116)**

*(cf. 0500 - Accountability)*

BP 5131.6(e)

**ALCOHOL AND OTHER DRUGS (continued)**

*Legal Reference:*

EDUCATION CODE

44049 *Known or suspected alcohol or drug abuse by student*  
 44645 *In-service training anabolic steroids*  
 48900 *Suspension or expulsion (grounds)*  
 48900.5 *Suspension, limitation on imposition; exception*  
 48901 *Smoking or use of tobacco prohibited*  
 48901.5 *Prohibition of electronic signaling devices*  
 48902 *Notification of law enforcement authorities; civil or criminal immunity*  
 48909 *Narcotics or other hallucinogenic drugs*  
 48915 *Expulsion; particular circumstances*  
 49602 *Confidentiality of pupil information*  
 51202 *Instruction in personal and public health and safety*  
 51203 *Instruction on alcohol, narcotics and restricted dangerous drugs*  
 51210 *Areas of study*  
 51220 *Areas of study, grades 7 to 12*  
 51260-51269 *Drug education*  
 60041 *Instructional materials*  
 60110-60115 *Instructional materials on alcohol and drug education*

BUSINESS AND PROFESSIONS CODE

25608 *Alcohol on school property; use in connection with instruction*

HEALTH AND SAFETY CODE

11032 *Narcotics, restricted dangerous drugs and marijuana*  
 11053-11058 *Standards and schedules*  
 11353.6 *Juvenile Drug Trafficking and Schoolyard Act*  
 11357 *Unauthorized possession of marijuana; possession in school or on school grounds*  
 11361.5 *Destruction of arrest or conviction records*  
 11372.7 *Drug program fund; uses*  
 11802 *Joint school-community alcohol abuse primary education and prevention program*  
 11965-11969 *The School Community Primary Prevention Program*  
 11998-11998.3 *Drug and Alcohol Abuse Master Plans*  
 11999-11999.3 *Alcohol and drug program funding; no unlawful use*  
 124175-124200 *Adolescent family life program*

PENAL CODE

13860-13864 *Suppression of drug abuse in schools*

VEHICLE CODE

13202.5 *Drug and alcohol related offenses by person under age of 21, but aged 13 or over;*

WELFARE AND INSTITUTIONS CODE

828 *Disclosure of information re minors*  
 828.1 *Disclosure of criminal records; protection of vulnerable staff & students*

UNITED STATES CODE, TITLE 20

5812 *National education goals*  
 7101-7184 *Safe and Drug Free Schools and Communities Act*  
 7101-7122 *Student Support and Academic Enrichment Grants*

*Management Resources: (see next page)*

BP 5131.6(f)

**ALCOHOL AND OTHER DRUGS (continued)***Management Resources:***WEB SITES**

California Department of Education, Alcohol, Tobacco and Other Drug  
Prevention: <http://www.cde.ca.gov/ls/he/at>

California Healthy Kids: <http://www.californiahealthykids.org>

~~U.S. Department of Education, Office of Safe and Drug Free  
Schools: <http://www.ed.gov/about/offices/list/osdfs/index.html>~~

**Office of Safe and Healthy Students: <https://www2.ed.gov/about/offices/list/ose/ohs>**

# CSBA Sample Board Policy

**Students**

BP 5141(a)

## **HEALTH CARE AND EMERGENCIES**

The Governing Board recognizes the importance of taking appropriate action whenever an emergency threatens the safety, health, or welfare of a student at school or during school-sponsored activities.

*(cf. 0450 - Comprehensive Safety Plan)*

*(cf. 3516 - Emergencies and Disaster Preparedness Plan)*

*(cf. 5141.21 - Administering Medication and Monitoring Health Conditions)*

*(cf. 5141.22 - Infectious Diseases)*

*(cf. 5142 - Safety)*

The Superintendent or designee shall develop procedures to ensure that first aid and/or medical attention is provided as quickly as possible when accidents and injuries to students occur and that parents/guardians are notified as appropriate.

*(cf. 3530 - Risk Management/Insurance)*

*(cf. 5143 - Insurance)*

*(cf. 6145.2 - Athletic Competition)*

The Superintendent or designee shall ask parents/guardians to provide emergency contact information in order to facilitate communication in the event of an accident or illness.

District staff shall appropriately report and document student accidents.

### **"Do Not Resuscitate" Orders**

The Board believes that staff members should not be placed in the position of determining whether or not to follow any parental or medical "do not resuscitate" orders. Staff shall not accept or follow any such orders except under the specific written direction of the Superintendent or designee. The Superintendent or designee may only direct a staff member to follow a "do not resuscitate" order if he/she has received a written parent/guardian authorization, with an authorized health care provider statement, and an order of an appropriate court.

The Superintendent or designee shall ensure that parents/guardians who have submitted a "do not resuscitate" order are informed of this policy.

### **Automated External Defibrillators**

The Board authorizes the Superintendent or designee to place automated external defibrillators (AEDs) at designated school sites for use by school employees in an emergency.

BP 5141(b)

**HEALTH CARE AND EMERGENCIES (continued)**

The Superintendent or designee shall develop guidelines for employees regarding these devices and shall ensure that employees receive information that describes sudden cardiac arrest, the school's emergency response plan, and the proper use of an AED. The guidelines shall also specify the placement, security, and maintenance of the AED.

The authorization of AEDs in district schools shall not be deemed to create a guarantee that an AED will be present or will be used in the case of an emergency, or that a trained employee will be present and/or able to use an AED in an emergency, or that the AED will operate properly.

*Legal Reference:*

EDUCATION CODE

32040-32044 *First aid equipment*

49300-49307 *School safety patrols*

49407 *Liability for treatment*

49408 *Emergency information*

49409 *Athletic events; physicians and surgeons; emergency medical care; immunity*

49417 *Automated external defibrillators*

49470 *Medical and hospital services for athletic program*

49471 *Medical and hospital services not provided or available*

49472 *Medical and hospital services for pupils*

49474 *Ambulance services*

51202 *Instruction in personal and public health and safety*

CIVIL CODE

1714.21 *Defibrillators; CPR; immunity from civil liability*

FAMILY CODE

6550-6552 *Caregivers*

HEALTH AND SAFETY CODE

1797.196 *Automated external defibrillators, immunity from civil liability*

1797.200 *Emergency medical services agency*

1799.102 *Personal liability immunity*

CODE OF REGULATIONS, TITLE 8

5193 *California Bloodborne Pathogens Standard*

CODE OF REGULATIONS, TITLE 22

100031-100042 *Automated external defibrillators*

*Management Resources:*

WEB SITES

*American Heart Association: <http://www.americanheart.org>*

*American Red Cross: <http://www.redcross.org>*

*California Department of Health Care Services: <http://www.dhcs.ca.gov>*

# CSBA Sample Administrative Regulation

**Students**

AR 5141(a)

## **HEALTH CARE AND EMERGENCIES**

### **Emergency Contact Information**

In order to facilitate contact in case of an emergency or accident, the principal or designee shall annually request that parents/guardians provide the following information:

1. Home address and telephone number
2. Parent/guardian's business address and telephone number
3. Parent/guardian's cell phone number and email address, if applicable
4. Name, address, and telephone number of an alternative contact person to whom the student may be released and who is authorized by the parent/guardian to care for the student in cases of emergency or when the parent/guardian cannot be reached
5. Local physician to call in case of emergency

*(cf. 5021 - Noncustodial Parents)*

*(cf. 5142 - Safety)*

In addition, parents/guardians shall be encouraged to notify the school whenever their emergency contact information changes.

### **Notification/Consent for Medical Treatment**

Whenever a student requires emergency or urgent medical treatment while at school or a school-sponsored activity, the principal or designee shall contact the parent/guardian or other person identified on the emergency contact form in order to obtain consent for the medical treatment.

If the student's parent/guardian or other contact person cannot be reached to provide consent, the principal may seek reasonable medical treatment for the student as needed, unless the parent/guardian has previously filed with the district a written objection to any medical treatment other than first aid.

*(cf. 5141.21 - Administering Medication and Monitoring Health Conditions)*



AR 5141(b)

**HEALTH CARE AND EMERGENCIES** (continued)

A person who has filed with the district a completed caregiver's authorization affidavit pursuant to Family Code 6550-6552 shall have the right to consent to or refuse school-related medical care on behalf of the minor student. The caregiver's authorization shall be invalid if the district receives notice that the minor student is no longer living with the caregiver or if the Superintendent or designee has actual knowledge of facts contrary to those stated on the affidavit. (Family Code 6550)

*(cf. 5111.1 - District Residency)*

The caregiver's consent to medical care shall be superseded by any contravening decision of the parent or other person having legal custody of the student, provided that this contravening decision does not jeopardize the student's life, health, or safety. (Family Code 6550)

**Automated External Defibrillators**

When an automated external defibrillator (AED) is placed in a district school, the Superintendent or designee shall notify an agent of the local emergency medical services agency of the existence, location, and type of AED acquired. (Health and Safety Code 1797.196, 1797.200)

The Superintendent or designee shall ensure that any AED placed at a district school is maintained and tested according to the operation and maintenance guidelines set forth by the manufacturer. (Health and Safety Code 1797.196)

The Superintendent or designee shall develop a written plan which describes the procedures to be followed in the event of a medical emergency, including an emergency that may involve the use of an AED. These procedures should include, but not be limited to, requirements for immediate notification of the 911 emergency telephone number in the event of an emergency that may involve the use of an AED.

*(cf. 0450 - Comprehensive Safety Plan)*

The principal of any district school with an AED shall annually provide information to school employees that describes: (Health and Safety Code 1797.196)

1. Sudden cardiac arrest
2. The school's emergency response plan
3. The proper use of an AED

Instructions on how to use the AED, in no less than 14-point type, shall be posted next to every AED. In addition, school employees shall be notified annually of the location of all AED units on campus. (Health and Safety Code 1797.196)

AR 5141(c)

**HEALTH CARE AND EMERGENCIES** (continued)

*(cf. 4112.9/4212.9/4312.9 - Employee Notifications)*

Each AED shall be checked for readiness at least biannually and after each use. In addition, the Superintendent or designee shall ensure that an inspection is made of all AEDs at least every 90 days for potential issues related to operability of the device, including a blinking light or other obvious defect that may suggest tampering or that another problem has arisen with the functionality of the AED. The Superintendent or designee shall maintain records of these checks. (Health and Safety Code 1797.196)

*(cf. 3580 - District Records)*

**Minor Revisions P. 4**

**AR 5141.4 - Child Abuse Prevention and Reporting**

In section "Training," consider adding optional paragraph at end of section to reflect AB 1058 (Ch. 748, Statutes of 2015), as follows:

**In addition, at least once every three years, school personnel may receive training in the prevention of child abuse, including sexual abuse, on school grounds, by school personnel, or in school-sponsored programs. (Education Code 44691)**

# CSBA Sample Board Policy

**Students** BP 5141.31(a)

## IMMUNIZATIONS

To protect the health of all students and staff and to curtail the spread of infectious diseases, the Governing Board shall cooperate with state and local public health agencies to encourage and facilitate immunization of all district students against preventable diseases.

*(cf. 1400 - Relations Between Other Governmental Agencies and the Schools)*

*(cf. 5141.22 - Infectious Diseases)*

*(cf. 5141.26 - Tuberculosis Testing)*

*(cf. 6142.8 - Comprehensive Health Education)*

Each student enrolling for the first time in a district elementary or secondary school, preschool, or child care and development program or, **after July 1, 2016, enrolling in or advancing to grade 7** shall present an immunization record from any authorized private or public health care provider certifying that he/she has received all required immunizations in accordance with law. Students shall be excluded from school or exempted from immunization requirements only as allowed by law.

*(cf. 5112.1 - Exemptions from Attendance)*

*(cf. 5112.2 - Exclusions from Attendance)*

*(cf. 5141.32 - Health Screening for School Entry)*

*(cf. 5148 - Child Care and Development)*

*(cf. 5148.3 - Preschool/Early Childhood Education)*

Each transfer student shall be requested to present his/her immunization record, if possible, upon registration at a district school.

*(cf. 6173 - Education for Homeless Children)*

*(cf. 6173.1 - Education for Foster Youth)*

*(cf. 6173.2 - Education of Children of Military Families)*

The Superintendent or designee may arrange for an authorized health care provider to administer immunizations at school to any student whose parent/guardian has consented in writing. At the beginning of the school year, parents/guardians shall be notified of their right to provide consent for the administration of an immunization to their child at school. (Education Code 49403)

*(cf. 5141.3 - Health Examinations)*

*(cf. 5141.6 - School Health Services)*

*(cf. 5145.6 - Parental Notifications)*

*Legal Reference: (see next page)*

BP 5141.31(b)

**IMMUNIZATIONS (continued)**

*Legal Reference:*

EDUCATION CODE

44871 *Qualifications of supervisor of health*

46010 *Total days of attendance*

48216 *Immunization*

48853.5 *Immediate enrollment of foster youth*

48980 *Required notification of rights*

49403 *Cooperation in control of communicable disease and immunizations*

49426 *Duties of school nurses*

49701 *Flexibility in enrollment of children of military families*

51745-51749.6 *Independent study*

HEALTH AND SAFETY CODE

120325-120380 *Immunization against communicable disease, especially:*

120335 *Immunization requirement for admission*

120395 *Information about meningococcal disease, including recommendation for vaccination*

120440 *Disclosure of immunization information*

CODE OF REGULATIONS, TITLE 5

430 *Student records*

CODE OF REGULATIONS, TITLE 17

6000-6075 *School attendance immunization requirements*

UNITED STATES CODE, TITLE 20

1232g *Family Educational Rights and Privacy Act*

UNITED STATES CODE, TITLE 42

11432 *Immediate enrollment of homeless children*

CODE OF FEDERAL REGULATIONS, TITLE 34

99.1-99.67 *Family Educational Rights and Privacy*

*Management Resources:*

CALIFORNIA DEPARTMENT OF PUBLIC HEALTH

*California Immunization Handbook for Child Care Programs and Schools, August 2015*

*Guide to Immunizations Required for Child Care*

*Guide to Immunizations Required for School Entry*

*Parents' Guide to Immunizations Required for Child Care*

*Parents' Guide to Immunizations Required for School Entry*

EDUCATION AUDIT APPEALS PANEL PUBLICATIONS

*Guide for Annual Audits of Local Education Agencies and State Compliance Reporting, July 2015*

U.S. DEPARTMENT OF EDUCATION GUIDANCE

*Family Educational Rights and Privacy Act (FERPA) and H1N1, October 2009*

WEB SITES

*California Department of Education: <http://www.cde.ca.gov>*

*California Department of Public Health, Immunization*

*Branch: <http://www.cdph.ca.gov/programs/immunize>*

*California Department of Public Health, Shots for Schools: <http://shotsforschools.org>*

*Centers for Disease Control and Prevention: <http://www.cdc.gov>*

*Education Audit Appeals Panel: <http://www.eaap.ca.gov>*

*U.S. Department of Education: <http://www.ed.gov>*

# CSBA Sample Administrative Regulation

Students AR 5141.31(a)

## IMMUNIZATIONS

### Required Immunizations

The Superintendent or designee shall provide parents/guardians, upon school registration, a written notice summarizing the state's immunization requirements.

The Superintendent or designee shall not unconditionally admit any student to a district elementary or secondary school, preschool, or child care and development program for the first time nor, after July 1, 2016, admit or advance any student to grade 7 unless the student has been fully immunized. The student shall present documentation of full immunization, in accordance with the age/grade and dose required by the California Department of Public Health (CDPH), against the following diseases: (Health and Safety Code 120335; 17 CCR 6020)

1. Measles, mumps, and rubella (MMR)
2. Diphtheria, tetanus, and pertussis (whooping cough) (DTP, DTaP, or Tdap)
3. Poliomyelitis (polio)
4. Hepatitis B
5. Varicella (chickenpox)
6. Haemophilus influenza type b (Hib meningitis)
7. Any other disease designated by the CDPH

*(cf. 5141.22 - Infectious Diseases)*

*(cf. 5148 - Child Care and Development)*

*(cf. 5148.3 - Preschool/Early Childhood Education)*

*(cf. 6170.1 - Transitional Kindergarten)*

**However, full immunization against hepatitis B shall not be a condition by which the Superintendent or designee shall admit or advance any student to grade 7. (Health and Safety Code 120335)**

**A student who qualifies for an individualized education program (IEP), unless otherwise exempt, shall be fully immunized in accordance with Health and Safety Code 120335 and this regulation. However, the district shall continue to implement the student's IEP and shall not prohibit the student from accessing any special education and related service required**

AR 5141.31(b)

**IMMUNIZATIONS** (continued)

**by his/her IEP regardless of whether the student is fully immunized.** (Health and Safety Code 120335)

*(cf. 6159 - Individualized Education Program)*

The student's immunization record shall be provided by the student's health care provider or from the student's previous school immunization record. The record must show at least the month and year for each dose, **except that the day, month, and year must be shown for the MMR doses given during the month of the first birthday and for the Tdap dose given during the month of the seventh birthday. (17 CCR 6070)**

**Exemptions**

Exemption from one or more immunization requirements shall be granted under any of the following circumstances:

1. The parent/guardian files with the district a written statement by a licensed physician to the effect that the physical condition of the child is such, or medical circumstances relating to the child are such, that immunization is not considered safe. The statement shall indicate the specific nature and probable duration of the medical condition or circumstances, including, but not limited to, family medical history, for which the physician does not recommend immunization. (Health and Safety Code 120370; 17 CCR 6051)
2. The student's parent/guardian files with the district, **before January 1, 2016**, a letter or written affidavit stating that an immunization is contrary to his/her personal beliefs, in which case the student shall be exempted from the immunization until he/she enrolls in the next applicable grade span requiring immunization (birth to preschool, grades K-6, grades 7-12). (Health and Safety Code 120335)

*(cf. 6141.2 - Recognition of Religious Beliefs and Customs)*

When a student transfers to a different school within the district or transfers into the district from another school district in California, his/her personal beliefs exemption filed before January 1, 2016, shall remain in effect until the next applicable grade span. A student transferring from a school outside the district shall present a copy of the personal beliefs exemption upon enrollment. When a student transfers into the district from outside California and presents a personal beliefs exemption issued by another state or country prior to January 1, 2016, the Superintendent or designee may consult with legal counsel regarding the applicable immunization requirements.

3. The student is enrolled in an independent study program pursuant to Education Code 51745-51749.6 and does not receive classroom-based instruction.

*(cf. 6158 - Independent Study)*

AR 5141.31(c)

## IMMUNIZATIONS (continued)

### Conditional Enrollment

The Superintendent or designee may conditionally admit a student with documentation from an authorized health care provider that: (Health and Safety Code 120340; 17 CCR 6000, 6035)

1. The student has not received all the immunizations required for his/her age group, but has commenced receiving doses of all required vaccines and is not due for any other doses at the time of admission.
2. The student has a temporary exemption from immunization for medical reasons pursuant to item #1 in the section "Exemptions" above.

The Superintendent or designee shall notify the student's parents/guardians of the date by which the student must complete all the remaining doses as specified in 17 CCR 6035.

*(cf. 5145.6 - Parental Notifications)*

**In addition, a transfer student may be conditionally admitted for up to 30 school days while his/her immunization records are being transferred from the previous school. If such documentation is not presented within 30 days, the student shall be excluded from school until the required immunizations have been administered. (17 CCR 6070)**

The Superintendent or designee shall review the immunization record of each student admitted conditionally every 30 days until that student has received all the required immunizations. If the student does not receive the required immunizations within the specified time limits, he/she shall be excluded from further attendance until the immunizations are received. (Health and Safety Code 120375; 17 CCR 6070)

The Superintendent or designee shall immediately enroll homeless students, foster youth, and students of military families even if their immunization records are missing or unavailable at the time of enrollment. School or district staff shall work with the student's prior school to obtain the student's immunization records or shall ensure that he/she is properly immunized. (Education Code 48853.5, 49701; Health and Safety Code 120341; 42 USC 11432)

*(cf. 6173 - Education for Homeless Children)*

*(cf. 6173.1 - Education for Foster Youth)*

*(cf. 6173.2 - Education of Children of Military Families)*



AR 5141.31(d)

## IMMUNIZATIONS (continued)

### Exclusions Due to Lack of Immunizations

Any student without the required evidence of immunization may be excluded from school until the immunization is obtained or an exemption is granted in accordance with the section "Exemptions" above.

*(cf. 5112.2 - Exclusions from Attendance)*

*(cf. 6183 - Home and Hospital Instruction)*

Before an already admitted student is excluded from school attendance because of lack of immunization, the Superintendent or designee shall notify the parent/guardian that he/she has 10 school days to supply evidence of proper immunization or an appropriate exemption. This notice shall refer the parent/guardian to the student's usual source of medical care or, if the student has no usual source of medical care, then to the county health department or school immunization program, if any. (Education Code 48216; 17 CCR 6040)

*(cf. 5141.6 - School Health Services)*

The Superintendent or designee shall exclude from further attendance any already admitted student who fails to obtain the required immunization within 10 school days following the parent/guardian's receipt of the notice specified above. The student shall remain excluded from school until he/she provides written evidence that he/she has received a dose of each required vaccine due at that time. The student shall also be reported to the attendance supervisor or principal. (17 CCR 6055)

### Exclusion Due to Exposure to Disease

**If the district has good cause to believe that a student has been exposed to a disease listed in the section "Required Immunizations" above and his/her documentation of immunization does not show proof of immunization against that disease, that student may be temporarily excluded from the school until the local health officer informs the district in writing that he/she is satisfied that the student is no longer at risk of developing or transmitting the disease. (Health and Safety Code 120370)**

### Records

The Superintendent or designee shall record each new entrant's immunizations in the California School Immunization Record and retain it as part of the student's mandatory permanent student record. District staff shall maintain the confidentiality of immunization records and may disclose such information to state and local health departments only in accordance with law. (Health and Safety Code 120375, 120440; 17 CCR 6070)

*(cf. 5125 - Student Records)*

AR 5141.31(e)

**IMMUNIZATIONS** (continued)

**The district shall also retain in the mandatory student record any physician or health officer statement, personal beliefs letter or affidavit, reason for conditional enrollment, or any other documentation related to the student's immunization record or exemptions.**

**Audits**

**If an audit reveals deficiencies in the district's reporting procedures, the Superintendent or designee shall present the Board with a plan to remedy such deficiencies.**

# CSBA Sample Administrative Regulation

**Students** AR 5145.3(a)

## NONDISCRIMINATION/HARASSMENT

The district designates the individual(s) identified below as the employee(s) responsible for coordinating the district's efforts to comply with applicable state and federal civil rights laws, including Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, Title II of the Americans with Disabilities Act, and the Age Discrimination Act of 1975, and to answer inquiries regarding the district's nondiscrimination policies. The individual(s) shall also serve as the compliance officer(s) specified in AR 1312.3 - Uniform Complaint Procedures as the responsible employee to handle complaints alleging unlawful discrimination targeting a student, including discriminatory harassment, intimidation, or bullying, based on the student's actual or perceived race, color, ancestry, national origin, nationality, ethnicity, ethnic group identification, age, religion, marital or parental status, pregnancy, physical or mental disability, sex, sexual orientation, gender, gender identity, gender expression, or any other legally protected status or association with a person or group with one or more of these actual or perceived characteristics. The coordinator/compliance officer(s) may be contacted at: (Education Code 234.1; 5 CCR 4621)

Director Student **Support** Services  
1500 N Avenue National City, 91950  
619-336-7740  
moconnor@nsd.us

*(cf. 1312.1 - Complaints Concerning District Employees)*  
*(cf. 1312.3 - Uniform Complaint Procedures)*

## Measures to Prevent Discrimination

To prevent unlawful discrimination, including discriminatory harassment, intimidation, retaliation, and bullying, of students at district schools or in school activities and to ensure equal access of all students to the educational program, the Superintendent or designee shall implement the following measures:

1. Publicize the district's nondiscrimination policy and related complaint procedures, including the coordinator/compliance officer's contact information, to students, parents/guardians, employees, volunteers, and the general public, **by** posting them on the district's web site and other prominent locations and providing easy access to them through district-supported social media, when **available-applicable**.

AR 5145.3(b)

**NONDISCRIMINATION/HARASSMENT** (continued)

**2. Post in a prominent and conspicuous location on the district and school web sites information regarding Title IX prohibitions against discrimination based on a student's sex, gender, gender identity, pregnancy, and parental status, including the following: (Education Code 221.61)**

**a. The name and contact information of the district's Title IX coordinator, including the phone number and email address**

**b. The rights of students and the public and the responsibilities of the district under Title IX, including a list of rights as specified in Education Code 221.8 and web links to information about those rights and responsibilities located on the web sites of the Office for Equal Opportunity and the U.S. Department of Education's Office for Civil Rights (OCR)**

**c. A description of how to file a complaint of noncompliance with Title IX in accordance with AR 1312.3 - Uniform Complaint Procedures, which shall include:**

**(1) An explanation of the statute of limitations within which a complaint must be filed after an alleged incident of discrimination has occurred and how a complaint may be filed beyond the statute of limitations**

**(2) An explanation of how the complaint will be investigated and how the complainant may further pursue the complaint, including web links to this information on the OCR's web site**

**(3) A web link to the OCR complaints form and the contact information for the office, including the phone number and email address for the office**

*(cf. 1113 - District and School Web Sites)*

*(cf. 1114 - District-Sponsored Social Media)*

**2.3.** Provide to students a handbook that contains age-appropriate information that clearly describes the district's nondiscrimination policy, procedures for filing a complaint, and resources available to students who feel that they have been the victim of any such behavior. (Education Code 234.1)

**3.4.** Annually notify all students and parents/guardians of the district's nondiscrimination policy, including its responsibility to provide a safe, nondiscriminatory school environment for all students, including transgender and gender-nonconforming students. The notice shall inform students and parents/guardians that they may request to meet with the compliance officer to determine how best to accommodate or resolve concerns that may arise from the district's implementation of its nondiscrimination policies. The notice shall also inform all students and AR

5145.3(c)

**NONDISCRIMINATION/HARASSMENT** (continued)

parents/guardians that, to the extent possible, the district will address any individual student's interests and concerns in private.

*(cf. 5145.6 - Parental Notifications)*

- 4.5.** The Superintendent or designee shall ensure that students and parents/guardians, including those with limited English proficiency, are notified of how to access the relevant information provided in the district's nondiscrimination policy and related complaint procedures, notices, and forms in a language they can understand.

If 15 percent or more of students enrolled in a particular district school speak a single primary language other than English, the district's policy, regulation, forms, and notices concerning nondiscrimination shall be translated into that language in accordance with Education Code 234.1 and 48985. In all other instances, the district shall ensure meaningful access to all relevant information for parents/guardians with limited English proficiency.

- 5-6.** Provide to students, employees, volunteers, and parents/guardians age-appropriate training and information regarding the district's nondiscrimination policy; what constitutes prohibited discrimination, including discriminatory harassment, intimidation, retaliation, or bullying; how and to whom a report of an incident should be made; and how to guard against segregating or stereotyping students when providing instruction, guidance, supervision, or other services to them. Such training and information shall include details of guidelines the district may use to provide a discrimination-free environment for all district students, including transgender and gender-nonconforming students.

*(cf. 1240 - Volunteer Assistance)*

*(cf. 4131 - Staff Development)*

*(cf. 4231 - Staff Development)*

*(cf. 4331 - Staff Development)*

- 6-7.** At the beginning of each school year, inform school employees that any employee who witnesses any act of unlawful discrimination, including discriminatory harassment, intimidation, or bullying, against a student is required to intervene if it is safe to do so. (Education Code 234.1)

- 7-8.** At the beginning of each school year, inform each principal or designee of the district's responsibility to provide appropriate assistance or resources to protect students' privacy rights and ensure their safety from threatened or potentially discriminatory behavior.

**Enforcement of District Policy**

The Superintendent or designee shall take appropriate actions to reinforce BP 5145.3 - Nondiscrimination/Harassment. As needed, these actions may include any of the following:

5145.3(d)

**NONDISCRIMINATION/HARASSMENT** (continued)

1. Removing vulgar or offending graffiti

*(cf. 5131.5 - Vandalism and Graffiti)*

2. Providing training to students, staff, and parents/guardians about how to recognize unlawful discrimination, how to report it or file a complaint, and how to respond

AR 5145.3(f)

3. Disseminating and/or summarizing the district's policy and regulation regarding unlawful discrimination

4. Consistent with the laws regarding the confidentiality of student and personnel records, communicating the school's response to students, parents/guardians, and the community

*(cf. 4112.6/4212.6/4312.6 - Personnel Files)*

*(cf. 4119.23/4219.23/4319.23 - Unauthorized Release of Confidential/Privileged Information)*

*(cf. 5125 - Student Records)*

5. Taking appropriate disciplinary action against students, employees, and anyone determined to have engaged in wrongdoing in violation of district policy, including any student who is found to have filed a complaint of discrimination that he/she knew was not true

*(cf. 4118 - Suspension/Disciplinary Action)*

*(cf. 4218 - Dismissal/Suspension/Disciplinary Action)*

*(cf. 5144 - Discipline)*

*(cf. 5144.1 - Suspension and Expulsion/Due Process)*

*(cf. 5144.2 - Suspension and Expulsion/Due Process (Students with Disabilities))*

*(cf. 6159.4 - Behavioral Interventions for Special Education Students)*

**Process for Initiating and Responding to Complaints**

Any student who feels that he/she has been subjected to unlawful discrimination described above or in district policy is strongly encouraged to immediately contact the compliance officer, principal, or any other staff member. In addition, any student who observes any such incident is strongly encouraged to report the incident to the compliance officer or principal, whether or not the alleged victim files a complaint.

Any school employee who observes an incident of unlawful discrimination, including discriminatory harassment, intimidation, retaliation, or bullying, or to whom such an incident is reported shall report the incident to the compliance officer or principal within a school day, whether or not the alleged victim files a complaint.

5145.3(e)

**NONDISCRIMINATION/HARASSMENT** (continued)

Any school employee who witnesses an incident of unlawful discrimination, including discriminatory harassment, intimidation, retaliation, or bullying, shall immediately intervene to stop the incident when it is safe to do so. (Education Code 234.1)

When a verbal report of unlawful discrimination, including discriminatory harassment, intimidation, retaliation, or bullying, is made to or received by the principal or compliance officer, he/she shall make a note of the report and encourage the student or parent/guardian to file the complaint in writing, pursuant to the provisions in AR 1312.3 - Uniform Complaint Procedures. Once notified verbally or in writing, the principal or compliance officer shall begin the investigation and shall implement immediate measures necessary to stop the discrimination and ensure that all students have access to the educational program and a safe school environment. Any interim measures adopted to address unlawful discrimination shall, to the extent possible, not disadvantage the complainant or a student who is the victim of the alleged unlawful discrimination.

Any report or complaint alleging unlawful discrimination by the principal, compliance officer, or any other person to whom a report would ordinarily be made or complaint filed shall instead be made to or filed with the Superintendent or designee who shall determine how the complaint will be investigated.

(cf. 5141.4 - Child Abuse Prevention and Reporting)

**Transgender and Gender-Nonconforming Students**

*Gender identity* of a student means the student's gender-related identity, appearance, or behavior as determined from the student's internal sense of his/her gender, whether or not that gender-related identity, appearance, or behavior is different from that traditionally associated with the student's physiology or assigned sex at birth.

*Gender expression* means a student's gender-related appearance and behavior, whether stereotypically associated with the student's assigned sex at birth. (Education Code 210.7)

*Gender transition* refers to the process in which a student changes from living and identifying as the sex assigned to the student at birth to living and identifying as the sex that corresponds to the student's gender identity.

*Gender-nonconforming student* means a student whose gender expression differs from stereotypical expectations.

*Transgender student* means a student whose gender identity is different from the gender he/she was assigned at birth.

5145.3(f)

**NONDISCRIMINATION/HARASSMENT** (continued)

Regardless of whether they are sexual in nature, acts of verbal, nonverbal, or physical aggression, intimidation, or hostility that are based on sex, gender identity, or gender expression, or that have the purpose or effect of producing a negative impact on the student's academic performance or of creating an intimidating, hostile, or offensive educational environment are prohibited. Examples of **the** types of conduct which are prohibited in the district and which may constitute gender-based harassment include, but are not limited to:

1. Refusing to address a student by a name and the pronouns consistent with his/her gender identity
2. Disciplining or disparaging a student or excluding him/her from participating in activities for behavior or appearance that is consistent with his/her gender identity or that does not conform to stereotypical notions of masculinity or femininity, as applicable
3. Blocking a student's entry to the bathroom that corresponds to his/her gender identity
4. Taunting a student because he/she participates in an athletic activity more typically favored by a student of the other sex
5. Revealing a student's transgender status to individuals who do not have a legitimate need for the information, without the student's consent
6. Use of gender-specific slurs
7. Physical assault of a student motivated by hostility toward him/her because of his/her gender, gender identity, or gender expression

The district's uniform complaint procedures (AR 1312.3) shall be used to report and resolve complaints alleging discrimination against transgender and gender-nonconforming students.

Examples of bases for complaints include, but are not limited to, the above list, as well as improper rejection by the district of a student's asserted gender identity, denial of access to facilities that correspond with a student's gender identity, improper disclosure of a student's transgender status, discriminatory enforcement of a dress code, and other instances of gender-based harassment.

To ensure that transgender and gender-nonconforming students are afforded the same rights, benefits, and protections provided to all students by law and Board policy, the district shall address each situation on a case-by-case basis, in accordance with the following guidelines:

1. Right to privacy: A student's transgender or gender-nonconforming status is his/her private information and the district shall only disclose the information to others with the student's prior written consent, except when the disclosure is otherwise required by law or when the district has compelling evidence that disclosure is necessary to preserve the student's physical or mental well-



5145.3(g)

**NONDISCRIMINATION/HARASSMENT** (continued)

being. In any case, the district shall only allow disclosure of a student's personally identifiable information to employees with a legitimate educational interest as determined by the district pursuant to 34 CFR 99.31. Any district employee to whom a student's transgender or gender-nonconforming status is disclosed shall keep the student's information confidential.

When disclosure of a student's gender identity is made to a district employee by a student, the employee shall seek the student's permission to notify the compliance officer. If the student refuses to give permission, the employee shall keep the student's information confidential, unless he/she is required to disclose or report the student's information pursuant to this **procedure administrative regulation**, and shall inform the student that honoring the student's request may limit the district's ability to meet the student's needs related to his/her status as a transgender or gender-nonconforming student. If the student permits the employee to notify the compliance officer, the employee shall do so within three school days.

As appropriate given the student's need for support, the compliance officer may discuss with the student any need to disclose the student's transgender or gender-nonconformity status or gender identity or gender expression to his/her parents/guardians and/or others, including other students, teacher(s), or other adults on campus. The district shall offer support services, such as counseling, to students who wish to inform their parents/guardians of their status and desire assistance in doing so.

*(cf. 1340 - Access to District Records)*

*(cf. 3580 - District Records)*

2. **Determining a Student's Gender Identity:** The compliance officer shall accept the student's assertion of his/her gender identity and begin to treat the student consistent with his/her gender identity unless district personnel present a credible and supportable basis for believing that the student's assertion is for an improper purpose.
3. **Addressing a Student's Transition Needs:** The compliance officer shall arrange a meeting with the student and, if appropriate, his/her parents/guardians to identify and develop strategies for ensuring that the student's access to education programs and activities is maintained. The meeting shall discuss the transgender or gender-nonconforming student's rights and how those rights may affect and be affected by the rights of other students and shall address specific subjects related to the student's access to facilities and to academic or educational support programs, services, or activities, including, but not limited to, sports and other competitive endeavors. In addition, the compliance officer shall identify specific school site employee(s) to whom the student may report any problem related to his/her status as a transgender or gender-nonconforming individual, so that prompt action could be taken to address it. Alternatively, if appropriate and desired by the student, the school may form a support team for the student that will meet periodically to assess whether the arrangements for the student are meeting his/her educational needs and providing equal access to programs and activities, educate appropriate staff about the student's transition, and serve as a resource to the student to better protect the student from gender-based discrimination.

5145.3(h)

**NONDISCRIMINATION/HARASSMENT** (continued)

4. **Accessibility to Sex-Segregated Facilities, Programs, and Activities:** When the district maintains sex-segregated facilities, such as restrooms and locker rooms, or offers sex-segregated programs and activities, such as physical education classes, intermural sports, and interscholastic athletic programs, students shall be permitted to access facilities and participate in programs and activities consistent with their gender identity. To address any student's privacy concerns in using sex-segregated facilities, the district shall offer available options such as a gender-neutral or single-use restroom or changing area, a bathroom stall with a door, an area in the locker room separated by a curtain or screen, access to a staff member's office, or use of the locker room before or after the other students. However, the district shall not require a student to utilize these options because he/she is transgender or gender-nonconforming. In addition, a student shall be permitted to participate in accordance with his/her gender identity in other circumstances where students are separated by gender, such as for class discussions, yearbook pictures, and field trips. A student's right to participate in a sex-segregated activity in accordance with his/her gender identity shall not render invalid or inapplicable any other eligibility rule established for participation in the activity.

*(cf. 6145 - Extracurricular and Cocurricular Activities)*

*(cf. 6145.2 - Athletic Competition)*

*(cf. 6153 - School-Sponsored Trips)*

*(cf. 7110 - Facilities Master Plan)*

5. **Student Records:** A student's legal name or gender as entered on the mandatory student record required pursuant to 5 CCR 432 shall only be changed pursuant to a court order. However, at the written request of a student or, if appropriate, his/her parents/guardians, the district shall use the student's preferred name and pronouns consistent with his/her gender identity on all other district-related documents. Such preferred name may be added to the student's record and official documents as permitted by law.

*(cf. 5125 - Student Records)*

*(cf. 5125.1 - Release of Directory Information)*

6. **Names and Pronouns:** If a student so chooses, district personnel shall be required to address the student by a name and the pronouns consistent with his/her gender identity, without the necessity of a court order or a change to his/her official district record. However, inadvertent slips or honest mistakes by district personnel in the use of the student's name and/or consistent pronouns **shall will, in general,** not constitute a violation of this administrative regulation or the accompanying district policy.

7. **Uniforms/Dress Code:** A student has the right to dress in a manner consistent with his/her gender identity, subject to any dress code adopted on a school site.

*(cf. 5132 - Dress Code)*

# CSBA Sample Board Policy

**Instruction** BP 6020(a)

## PARENT INVOLVEMENT

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 ~~work with staff and~~ **consult with** parents/guardians **and family members in the development of** ~~to develop~~ meaningful opportunities ~~at all grade levels~~ for ~~parents/guardians~~ **them** to be involved in district and school activities **at all grade levels**; advisory, decision-making, and advocacy roles; and activities to support learning at home.

*(cf. 0420 - School Plans/Site Councils)*

*(cf. ~~0520.2 - Title I Program Improvement Schools~~)*

*(cf. 1220 - Citizen Advisory Committees)*

*(cf. 1230 - School-Connected Organizations)*

*(cf. 1240 - Volunteer Assistance)*

*(cf. 1250 - Visitors/Outsiders)*

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)*

*(cf. ~~5145.6 - Parental Notifications~~)*

**The district's local control and accountability plan shall include goals and strategies for parent/guardian involvement, 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 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/guardian and family engagement** ~~involvement~~ efforts, including, but not limited to, input from parents/guardians, **family members**, and school staff on the adequacy of **parent** involvement opportunities and **on** barriers that may inhibit **parent/guardian** participation.

*(cf. 0500 - Accountability)*

BP 6020(b)

**PARENT INVOLVEMENT (continued)**

**Title I Schools**

~~Each year the Superintendent or designee shall identify specific objectives of the district's parent involvement program for schools that receive Title I funding. He/she shall ensure that parents/guardians are consulted and participate in the planning, design, implementation, and evaluation of the parent involvement program. (Education Code 11503)~~

~~(cf. 6171 - Title I Programs)~~

~~The Superintendent or designee shall ensure that the district's parent involvement strategies are jointly developed with and agreed upon by parents/guardians of students participating in Title I programs. Those strategies shall establish expectations for parent involvement and describe how the district will carry out each activity listed in 20 USC 6318. (20 USC 6318)~~

**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 the 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 11503; 20 USC 6318)**

~~(cf. 6171 - Title I Programs)~~

**When the district's Title I, Part A allocation exceeds the amount specified in 20 USC 6318, the Board shall reserve at least one percent of the funding to implement parent/guardian and family engagement activities. The Superintendent or designee shall consult with parents/guardians of participating students in the planning and implementation of parent involvement programs, activities, and regulations. He/she also 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 involvement activities and shall ensure that priority is given to schools in high poverty areas in accordance with law. (20 USC 6318, 6631)**

**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**

BP 6020(c)

**PARENT INVOLVEMENT (continued)**

- 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 involvement** 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 11502. (Education Code 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 and accountability plan**

EDUCATION CODE (continued)

**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 ~~Parental notice of teacher qualifications and student achievement~~ **State plan**

6314 Schoolwide programs

~~6316 School improvement~~

*Legal Reference continued: (see next page)*

BP 6020(d)

**PARENT INVOLVEMENT (continued)**

*Legal Reference: (continued)*

6312 Local educational agency plan  
 6318 Parent ~~involvement~~ 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:*

**CSBA PUBLICATIONS**  
**Parent Involvement: Development of Effective and Legally Compliant Policies, Governance and Policy Services Policy Briefs, August 2006**  
**STATE BOARD OF EDUCATION POLICIES**  
**89-01 Parent Involvement in the Education of Their Children, rev. 1994**  
**CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS**  
**Title I School-Level Parental Involvement Policy**  
**Family Engagement Framework: A Tool for California School Districts, 2014**  
**U.S. DEPARTMENT OF EDUCATION PUBLICATIONS NON-REGULATORY GUIDANCE**  
**Parental Involvement: Title I, Part A, Non-Regulatory Guidance, April 23, 2004**  
**WEB SITES**  
 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>  
**No Child Left Behind: <http://www.ed.gov/nclb>**  
 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>

# CSBA Sample Administrative Regulation

**Instruction** AR 6020(a)

## PARENT INVOLVEMENT

### District Strategies for Title I Schools

To ensure that parents/guardians **and family members** of students participating in Title I programs are provided with opportunities to be involved in their children's education, the **Superintendent or designee district** shall:

1. Involve parents/guardians **of participating students and family members** in the joint development of ~~the Title I local educational agency (LEA) plan pursuant to a district plan that meets the requirements of 20 USC 6312 and in the process of school review and improvement pursuant to 20 USC 6316~~ **development of school support and improvement plans pursuant to 20 USC 6311** (20 USC 6318)

*(cf. 0460 - Local Control and Accountability Plan)*

*(cf. 6171 - Title I Programs)*

The Superintendent or designee may:

- a. **In accordance with Education Code 52063, e**Establish a district-level **parent advisory committee** ~~including parent/guardian representatives from each school site and, as applicable, an English learner parent advisory committee~~ to review and comment on the **LEA** plan in accordance with the review schedule established by the Governing Board
- b. Invite input on the **LEA** plan from other district committees and school site councils
 

*(cf. 0420 - School Plans/Site Councils)*  
*(cf. 1220 - Citizen Advisory Committees)*
- c. Communicate with parents/guardians through the district newsletter, web site, or other methods regarding the **LEA** plan and the opportunity to provide input
- d. Provide copies of working drafts of the **LEA** plan to parents/guardians in an understandable and uniform format and, to the extent practicable, in a language the parents/guardians can understand
- e. Ensure that there is an opportunity at a public Board meeting for public comment on the **LEA** plan prior to the Board's approval of the plan or revisions to the plan

AR 6020(b)

**PARENT INVOLVEMENT (continued)**

- f. Ensure that school-level policies on parent/**guardian and family engagement involvement** address the role of school site councils and other parents/guardians as appropriate in the development and review of school plans
2. Provide coordination, technical assistance, and other support necessary to assist **and build the capacity of** Title I schools in planning and implementing effective parent/**guardian and family engagement involvement** activities to improve student academic achievement and school performance, **which may include meaningful consultation with employers, business leaders, and philanthropic organizations or individuals with expertise in effectively engaging parents/guardians and family members in education** (20 USC 6318)

*(cf. 1700 - Relations Between Private Industry and the Schools)*

~~The Superintendent or designee may:~~

- a. ~~Assign person(s) in the district office to serve as a liaison to the schools regarding Title I parent involvement issues~~
- b. ~~Provide training for the principal or designee of each participating school regarding Title I requirements for parent involvement, leadership strategies, and communication skills to assist him/her in facilitating the planning and implementation of parent involvement activities~~
- c. ~~Provide ongoing district level workshops to assist school site staff and parents/guardians in planning and implementing improvement strategies, and seek input from parents/guardians in developing the workshops~~
- d. ~~Provide information to schools about the indicators and assessment tools that will be used to monitor progress~~

~~3. Build the capacity of schools and parents/guardians for strong parent involvement (20 USC 6318)~~

The Superintendent or designee shall: (20 USC 6318)

- a. Assist parents/guardians in understanding such topics as the **challenging** state's academic content standards and academic achievement standards, state and local academic assessments, the requirements of Title I, and how to monitor a child's progress and work with educators to improve the achievement of their children

*(cf. 6011 - Academic Standards)*

*(cf. 6162.5 - Student Assessment)*

*(cf. 6162.51 - State Academic Achievement Tests)*

*(cf. 6162.52 - High School Exit Examination)*



AR 6020(c)

**PARENT INVOLVEMENT (continued)**

- b. Provide **parents/guardians with** materials and training, **such as literacy training and using technology (including education about the harms of copyright piracy)**, as appropriate, to help **parents/guardians them** work with their children to improve their children's achievement, **such as literacy training and using technology, as appropriate, to foster parent involvement**
- c. **With the assistance of parents/guardians, e**Educate teachers, **student services specialized instructional support** personnel, principals **and other school leaders**, and other staff, **with the assistance of parents/guardians**, in the value and utility of parent/guardian contributions and in how to reach out to, communicate with, and work with parents/guardians as equal partners, implement and coordinate parent/guardian programs, and build ties between parents/guardians and the schools

*(cf. 4131 - Staff Development)*

*(cf. 4231 - Staff Development)*

*(cf. 4331 - Staff Development)*

- d. To the extent feasible and appropriate, coordinate and integrate parent/**guardian** involvement programs and activities with **other federal, state, and local programs, including public preschool programs, Head Start, Reading First, Early Reading First, Even Start, Home Instruction Programs for Preschool Youngsters, Parents as Teachers Program, public preschool, and other programs**, and conduct other activities, such as parent resource centers, that encourage and support parents/guardians in **more** fully participating in their children's education
- e. Ensure that information related to school and parent/guardian programs, meetings, and other activities is sent to the parents/guardians of participating students in a format and, to the extent practicable, in a language the parents/guardians can understand
- f. Provide other such reasonable support for parent/**guardian** involvement activities as parents/guardians may request
- g. Inform parents/guardians and parent organizations of the existence and purpose of parent information and resource centers in the state that provide training, information, and support to parents/guardians of participating students.

In addition, the Superintendent or designee may:

- a. Involve parents/guardians in the development of training for teachers, principals, and other educators to improve the effectiveness of such training
- b. Provide necessary literacy training, using Title I funds if the district has exhausted all other reasonably available sources of funding for such training

AR 6020(d)

**PARENT INVOLVEMENT (continued)**

- c. Pay reasonable and necessary expenses associated with parent/**guardian** involvement activities, including transportation and child care costs, to enable parents/guardians to participate in school-related meetings and training sessions
- d. Train parents/guardians to enhance the involvement of other parents/guardians
- e. Arrange school meetings at a variety of times or, when parents/guardians are unable to attend such conferences, conduct in-home conferences between parents/guardians and teachers or other educators who work directly with participating students, **in order to maximize parent/guardian involvement and participation**
- f. Adopt and implement model approaches to improving parent/**guardian** involvement
- g. Establish a districtwide parent advisory council to provide advice on all matters related to parent/**guardian** involvement in Title I programs
- h. Develop appropriate roles for community-based organizations and businesses in parent/**guardian** involvement activities
- i. Make referrals to community agencies and organizations that offer literacy training, parent/**guardian** education programs, and/or other services that help to improve the conditions of parents/guardians and families

*(cf. 1020 - Youth Services)*

- j. Provide a master calendar of district activities and district meetings
- k. Provide information about opportunities for parent/**guardian and family engagement involvement** through the district newsletter, web site, or other written or electronic means
- l. Engage parent-teacher organizations to actively seek out and involve parents/guardians through regular communication updates and information sessions

*(cf. 1230 - School-Connected Organizations)*

- m. To the extent practicable, provide translation services at school sites and at meetings involving parents/guardians **and family members** as needed
- n. Provide training and information to members of district and school site councils and advisory committees to help them fulfill their functions

AR 6020(e)

**PARENT INVOLVEMENT (continued)**

**e.o.** Provide ongoing district-level workshops to assist school site staff, ~~and~~ parents/guardians, **and family members** in planning and implementing improvement strategies, and seek **their** input ~~from parents/guardians~~ in developing the workshops

**b.p.** Provide training for the principal or designee of each participating school regarding Title I requirements for parent/**guardian and family engagement** involvement, leadership strategies, and communication skills to assist him/her in facilitating the planning and implementation of ~~parent involvement~~ **related** activities

**e.q.** Regularly evaluate the effectiveness of staff development activities related to parent/**guardian and family engagement** involvement

**p.r.** Include expectations for parent/guardian outreach and involvement in staff job descriptions and evaluations

*(cf. 4115 - Evaluation/Supervision)*

*(cf. 4215 - Evaluation/Supervision)*

*(cf. 4315 - Evaluation/Supervision)*

**a.s.** Assign ~~person(s) in the district office~~ **district personnel** to serve as a liaison to the schools regarding Title I parent/**guardian and family engagement** involvement issues

**d.t.** Provide information to schools about the indicators and assessment tools that will be used to monitor progress

**4. 3.** **To the extent feasible and appropriate, c**oordinate and integrate Title I parent/**guardian and family engagement** involvement strategies with ~~Head Start, Reading First, Early Reading First, Even Start, Home Instruction Program for Preschool Youngsters, Parents as Teachers Program, public preschool, and other programs~~ **parent/guardian and family engagement strategies of other relevant federal, state, and local programs and ensure consistency with federal, state, and local laws** (20 USC 6318)

*(cf. 5148.3 - Preschool/Early Childhood Education)*

The Superintendent or designee may:

a. Identify overlapping or similar program requirements

*(cf. 0430 - Comprehensive Local Plan for Special Education)*

*(cf. 2230 - Representative and Deliberative Groups)*

*(cf. 3280 - Sale or Lease of District-Owned Real Property)*

*(cf. 5030 - Student Wellness)*

*(cf. 5148 - Child Care and Development)*

*(cf. 5148.3 - Preschool/Early Childhood Education)*

AR 6020(f)

**PARENT INVOLVEMENT (continued)***(cf. 6174 - Education for English Learners)**(cf. 6175 - Migrant Education Program)**(cf. 6178 - Career Technical Education)*

- b. Involve district and school site representatives from other programs to assist in identifying specific population needs
  - c. Schedule joint meetings with representatives from related programs and share data and information across programs
  - d. Develop a cohesive, coordinated plan focused on student needs and shared goals
- 5. 4.** Conduct, with **meaningful** involvement of parents/guardians **and family members**, an annual evaluation of the content and effectiveness of the **parent/guardian and family engagement involvement** policy in improving the academic quality of the schools served by Title I, **including identification of:** (20 USC 6318)

**The Superintendent or designee shall:**

- a. **Ensure that the evaluation include the identification of barriers to greater participation in parent/guardian and family engagement involvement activities, with particular attention to parents/guardians who are economically disadvantaged, are disabled, have limited English proficiency, have limited literacy, or are of any racial or ethnic minority background (20 USC 6318)**
- b. **The needs of parents/guardians and family members, so they can better assist with their children's learning and engage with school personnel and teachers**
- c. **Strategies to support successful school and family interactions**

*(cf. 0500 - Accountability)*

- e. **Assess the district's progress in meeting annual objectives for the parent involvement program; The Superintendent or designee shall notify parents/guardians of this review and assessment through regular school communications mechanisms; and shall provide a copy of the assessment to parents/guardians upon their request. (Education Code 11503)**
- b. **Use the evaluation results to design strategies for more effective parent involvement and, if necessary, to recommend changes in the parent involvement policy (20 USC 6318)**
- c. **Assess the district's progress in meeting annual objectives for the parent involvement program, notify parents/guardians of this review and assessment through regular school**

AR 6020(g)

**PARENT INVOLVEMENT (continued)**

~~communications mechanisms, and provide a copy to parents/guardians upon their request (Education Code 11503)~~

The Superintendent or designee may:

- a. Use a variety of methods, such as focus groups, surveys, and workshops, to evaluate the satisfaction of parents/guardians and staff with the quality and frequency of district communications
  - b. Gather and monitor data regarding the number of parents/guardians **and family members** participating in district activities and the types of activities in which they are engaged
  - c. Recommend to the Board measures to evaluate the impact of the district's parent/**guardian and family engagement involvement** efforts on student achievement
- b. 5.** Use the ~~evaluation results~~ **findings of the evaluation conducted pursuant to item #4 above** to design **evidence-based** strategies for more effective parent/**guardian and family** involvement and, if necessary, to ~~recommend changes in~~ **revise** the parent/**guardian and family engagement involvement** policy (20 USC 6318)
6. Involve parents/guardians in the activities of schools served by Title I, **which may include establishing a parent advisory board comprised of a sufficient number and representative group of parents/guardians or family members served by the district to adequately represent the needs of the population served by the district for the purposes of developing, revising, and reviewing the parent/guardian and family engagement policy** (20 USC 6318)

The Superintendent or designee may:

- a. Include information about school activities in district communications to parents/guardians **and family members**
- b. To the extent practicable, assist schools with translation services or other accommodations needed to encourage participation of parents/guardians **and family members** ~~with special needs~~
- c. Establish processes to encourage parent/guardian input regarding their expectations and concerns for their children

The district's Board policy and administrative regulation containing parent/**guardian and family engagement involvement** strategies shall be incorporated into the ~~LEA plan~~ **district's local control and accountability plan in accordance with 20 USC 6312** and **shall be** distributed to parents/guardians of students participating in Title I programs. (20 USC 6318)

AR 6020(h)

**PARENT INVOLVEMENT (continued)**

*(cf. 5145.6 - Parental Notifications)*

**School-Level Policies for Title I Schools**

At each school receiving Title I funds, a written policy on parent/**guardian and family engagement involvement** shall be developed jointly with ~~and agreed upon by the~~ parents/guardians **and family members** of participating students. Such policy shall describe the means by which the school will: (20 USC 6318)

1. Convene an annual meeting, at a convenient time, to which all parents/guardians of participating students shall be invited and encouraged to attend, in order to inform parents/guardians of their school's participation in Title I and to explain Title I requirements and the right of parents/guardians to be involved
2. Offer a flexible number of meetings, such as meetings in the morning or evening, for which related transportation, child care, and/or home visits may be provided as such services relate to parent/**guardian** involvement
3. Involve parents/guardians in an organized, ongoing, and timely way in the planning, review, and improvement of Title I programs, including the planning, review, and improvement of the school's parent/**guardian and family engagement involvement** policy and, if applicable, the joint development of the plan for schoolwide programs pursuant to 20 USC 6314  
The school may use an existing process for involving parents/guardians in the joint planning and design of the school's programs provided that the process includes adequate representation of parents/guardians of participating students.
4. Provide the parents/guardians of participating students all of the following:
  - a. Timely information about Title I programs
  - b. A description and explanation of the school's curriculum, forms of academic assessment used to measure student progress, and ~~the proficiency levels students are expected to meet~~ **the achievement levels of the challenging state academic standards**

*(cf. 5121 - Grades/Evaluation of Student Achievement)*

*(cf. 5123 - Promotion/Acceleration/Retention)*

- c. If requested by parents/guardians, opportunities for regular meetings to formulate suggestions and to participate, as appropriate, in decisions related to their children's education, and, as soon as practicably possible, responses to the suggestions of parents/guardians

AR 6020(i)

**PARENT INVOLVEMENT (continued)**

5. If the schoolwide program plan is not satisfactory to the parents/guardians of participating students, submit any parent/guardian comments when the school makes the plan available to the district
6. Jointly develop with the parents/guardians of participating students a school-parent compact that outlines how parents/guardians, the entire school staff, and students will share responsibility for improved student academic achievement and the means by which the school and parents/guardians will build a partnership to help students achieve state standards

This compact shall address:

- a. The school's responsibility to provide high-quality curriculum and instruction in a supportive and effective learning environment that enables participating students to achieve the state's **student challenging** academic achievement standards
- b. Ways in which parents/guardians will be responsible for supporting their children's learning, ~~such as monitoring attendance, homework completion, and television viewing;~~ volunteering in the classroom; and participating, as appropriate, in decisions related to their children's education and the positive use of extracurricular time

*(cf. 1240 - Volunteer Assistance)*

*(cf. 5020 - Parent Rights and Responsibilities)*

*(cf. 5113 - Absences and Excuses)*

*(cf. 6145 - Extracurricular/Cocurricular Activities)*

*(cf. 6154 - Homework/Makeup Work)*

- c. The importance of communication between teachers and parents/guardians on an ongoing basis through, at a minimum:
  - (1) Parent-teacher conferences in elementary schools, at least annually, during which the compact shall be discussed as it relates to the student's achievement
  - (2) Frequent reports to parents/guardians on their children's progress
  - (3) Reasonable access to staff, opportunities to volunteer and participate in their child's classroom, and observation of classroom activities
  - (4) Regular two-way, meaningful communication between family members and school staff, and, to the extent practicable, in a language that family members can understand**

AR 6020(j)

**PARENT INVOLVEMENT (continued)**

7. Build the capacity of the school and parents/guardians for strong parent involvement by implementing the **required** activities described in ~~items #3a-h~~ **item #2** in the section "District Strategies for Title I Schools" above
8. To the extent practicable, provide **full** opportunities for the **informed** participation of parents/guardians **and family members (including parents/guardians and family members with limited English proficiency, parents/guardians and family members with disabilities, and parents/guardians and family members of migrant children)**, including providing information and school reports required under 20 USC 6311(h) in a format and language such parents/guardians can understand

If the school has a parent involvement policy that applies to all parents/guardians, it may amend that policy to meet the above requirements. (20 USC 6318)

Each school's parent/**guardian and family engagement involvement** policy shall be made available to the local community. **Parents/guardians shall be notified of the policy and distributed to parents/guardians of participating students** in an understandable and uniform format and, to the extent practicable, provided in a language the parents/guardians can understand. (20 USC 6318)

Each school receiving Title I funds shall annually evaluate the effectiveness of its parent/**guardian and family engagement involvement** policy. Such evaluation may be conducted during the process of reviewing the school's single plan for student achievement in accordance with Education Code 64001.

~~The principal or designee, jointly with parents/guardians of participating students,~~ **The school's policy** shall **be** periodically updated ~~the school's policy~~ to meet the changing needs of parents/guardians and the school. (20 USC 6318)

**~~District Strategies for Non-Title I Schools~~**

~~For each school that does not receive federal Title I funds, the Superintendent or designee shall, at a minimum:~~

- ~~1. Engage parents/guardians positively in their children's education by helping them develop skills to use at home that support their children's academic efforts at school and their children's development as responsible members of society (Education Code 11502, 11504)~~

~~The Superintendent or designee may:~~



AR 6020(k)

**PARENT INVOLVEMENT (continued)**

a. Provide or make referrals to literacy training and/or parent education programs designed to improve the skills of parents/guardians and enhance their ability to support their children's education

AR 6020(n)

b. Provide information, in parent handbooks and through other appropriate means, regarding academic expectations and resources to assist with the subject matter

c. Provide parents/guardians with information about students' class assignments and homework assignments

2. Inform parents/guardians that they can directly affect the success of their children's learning, by providing them with techniques and strategies that they may use to improve their children's academic success and to assist their children in learning at home (Education Code 11502, 11504)

The Superintendent or designee may:

a. Provide parents/guardians with information regarding ways to create an effective study environment **for their children** at home and to encourage good study habits

b. Encourage parents/guardians to monitor their children's school attendance, homework completion, and television viewing

c. Encourage parents/guardians to volunteer in their child's classroom and to participate in school advisory committees

3. Build consistent and effective communication between the home and school so that parents/guardians may know when and how to assist their children in support of classroom learning activities (Education Code 11502, 11504)

The Superintendent or designee may:

a. Ensure that teachers provide frequent reports to parents/guardians on their children's progress and hold parent teacher conferences at least once per year with parents/guardians of elementary school students

b. Provide opportunities for parents/guardians to observe classroom activities and to volunteer in their child's classroom

AR 6020(o)

AR 6020(1)

**PARENT INVOLVEMENT (continued)**

- e. Provide information about parent/**guardian and family engagement** involvement opportunities through district, school, and/or class newsletters, the district's web site, and other written or electronic communications
  - d. To the extent practicable, provide notices and information to parents/guardians in a format and language they can understand
  - e. Develop mechanisms to encourage parent/guardian input on district and school issues
  - f. Identify barriers to parent/guardian **and family** participation in school activities, including parents/guardians **and family members** who are economically disadvantaged, are disabled, have limited English proficiency, have limited literacy, or are of any racial or ethnic minority background
  - g. Encourage greater parent/guardian participation by adjusting meeting schedules to accommodate parent/guardian needs and, to the extent practicable, by providing translation or interpreter services, transportation, and/or child care
4. Train teachers and administrators to communicate effectively with parents/guardians (Education Code 11502, 11504)
- The Superintendent or designee may:
- a. Provide staff development to assist staff in strengthening two-way communications with parents/guardians, including parents/guardians who have limited English proficiency or limited literacy
  - b. Invite input from parents/guardians regarding the content of staff development activities pertaining to home-school communications
5. Integrate parent/**guardian and family engagement** involvement programs into school plans for academic accountability
- The Superintendent or designee may:
- a. Include parent/**guardian and family engagement** involvement strategies in school reform or school improvement initiatives
  - b. Involve parents/guardians **and family members** in school planning processes

# CSBA Sample Administrative Regulation

**Instruction** AR 6112(a)

## SCHOOL DAY

### Kindergarten/Transitional Kindergarten

**Kindergarten and transitional kindergarten (TK) classes in district schools may be maintained for different lengths of time, either at the same or different school sites. (Education Code 37202)**

Except as otherwise **provided permitted** by law, the average school day established for kindergarten **and TK** students shall be at least three hours, including recesses but excluding noon intermissions, but no longer than four hours, excluding recesses. (Education Code 46111, 46114, 46115, 46117)

Recess may be counted as instructional minutes for purposes of determining the maximum school day if **it occurs under** teacher supervision ~~occurs~~.

In any multitrack year-round school operating pursuant to Education Code 37670(a), the kindergarten school day may be up to 265 minutes, excluding recesses. (Education Code 46111)

*(cf. 6117 - Year-Round Schedules)*

In any district school operating an early primary program pursuant to Education Code 8970-8974, the kindergarten school day may exceed four hours, excluding recess, if both of the following conditions are met: (Education Code 8973)

1. The Governing Board has declared that the extended-day kindergarten program does not exceed the length of the primary school day.
2. The extended-day kindergarten program includes ample opportunity for both active and quiet activities within an integrated, experiential, and developmentally appropriate educational program.

**The Superintendent or designee shall annually report to the California Department of Education as to whether the district's kindergarten and TK programs are offered full day, part day, or both. (Education Code 48003)**

### Grades 1-8

Except as otherwise provided by law, the school day for elementary and middle school students shall be:

AR 6112(b)

**SCHOOL DAY** (continued)

1. At least 230 minutes for students in grades 1-3, unless the Board has prescribed a shorter school day because of lack of school facilities requiring double sessions, in which case the minimum school day shall be 200 minutes. (Education Code 46112, 46142)
2. At least 240 minutes for students in grades 4-8 (Education Code 46113, 46142)

In determining the number of minutes for purposes of compliance with the minimum school day for students in grades 1-8, both noon intermissions and recesses shall be excluded. (Education Code 46115)

**Grades 9-12**

~~The school day for students in grades 9-12 shall be at least 240 minutes. (Education Code 46141, 46142)~~

~~However, the school day may be less than 240 minutes when authorized by law. Programs that have a minimum school day of 180 minutes include, but are not necessarily limited to:~~

- ~~1. Continuation high school or classes (Education Code 46141, 46170)~~

~~(cf. 6184 - Continuation Education)~~

- ~~2. Opportunity school or classes (Education Code 46141, 46180)~~

- ~~3. Regional occupational center (Education Code 46141, 52325)~~

~~(cf. 6178.2 - Regional Occupational Center/Program)~~

- ~~4. Work experience education program approved pursuant to Education Code 51760-51769.5 (Education Code 46141, 46144)~~

~~A student in grade 12 who is enrolled in work experience education and is in his/her last semester or quarter before graduation may be permitted to attend school for less than 180 minutes per school day if he/she would complete all requirements for graduation, except physical education courses, in less than 180 minutes each day. (Education Code 46147)~~

~~(cf. 6178.1 - Work Based Learning)~~

- ~~5. Concurrent enrollment in a community college pursuant to Education Code 48800-48802 or, for students in grades 11-12, part-time enrollment in classes of the California State University or University of California, provided academic credit will be awarded upon satisfactory completion of enrolled courses (Education Code 46146)~~

~~(cf. 6172.1 - Concurrent Enrollment in College Classes)~~

AR 6112(c)

**SCHOOL DAY** (continued)

~~6. An early college high school or middle college high school, provided the students are enrolled in community college or college classes in accordance with item #5 above (Education Code 46141, 46146.5)~~

~~7. Special day or Saturday vocational training program conducted under a federally approved plan for career technical education (Education Code 46141, 46144)~~

~~(cf. 6178 Career Technical Education)~~

~~8. Adult education classes (Education Code 46190)~~

~~(cf. 6200 Adult Education)~~

~~For an evening high school operated pursuant to Education Code 51720-51724, the number of days, specific days of the week, and number of hours during which the program shall be in session shall **may** be determined by the Board. (Education Code 46141, 51721)~~

~~Students in grade 12 shall be enrolled in at least five courses each semester or the equivalent number of courses each quarter. This requirement shall not apply to students enrolled in regional occupational centers or programs, courses at accredited postsecondary institutions, independent study, special education programs in which the student's individualized education program establishes a different number of courses, continuation education classes, work experience education programs, or any other course of study authorized by the Board that is equivalent to the approved high school course of study. (Education Code 46145)~~

~~(cf. 6158 Independent Study)~~

~~(cf. 6159 Individualized Education Program)~~

**Alternative Block Schedule for Secondary Schools**

~~In order to establish a block or other alternative schedule or to accommodate career technical education and regional occupational center/program courses, the district may authorize students to attend fewer than the total number of days in which school is in session provided that students attend classes for at least 1,200 minutes during any five school day period or 2,400 minutes during any 10 school day period. (Education Code 46160)~~

~~**An early college high school or middle college high school may be scheduled so that students attend classes for at least 900 minutes during any five school day period or 1,800 minutes during any 10 school day period. (Education Code 46160)**~~

# CSBA Sample Board Policy

**Instruction** BP 6142.7(a)

## PHYSICAL EDUCATION AND ACTIVITY

The Governing Board recognizes the positive benefits of physical activity on student health and academic achievement. The district shall provide all students the opportunity to be physically active on a regular basis through high-quality physical education instruction and may provide additional opportunities for physical activity throughout the school day. The district's physical education and activity programs shall support the district's coordinated student wellness program and encourage students' lifelong fitness.

*(cf. 5030 - Student Wellness)*

*(cf. 6142.8 - Comprehensive Health Education)*

The district's physical education program shall provide a developmentally appropriate sequence of instruction aligned with the state's model content standards and curriculum framework.

*(cf. 6011 - Academic Standards)*

*(cf. 6143 - Courses of Study)*

~~For grades 9-12, the overall course of study for grades 9-12 shall include the effects of physical activity upon dynamic health, the mechanics of body movement, aquatics, gymnastics and tumbling, individual and dual sports, rhythms and dance, team sports, and combatives. (Education Code 33352; 5 CCR 10060)~~

~~The Board shall approve the courses in grades 9-12 for which physical education credit may be granted.~~

*(cf. 6146.1 - High School Graduation Requirements)*

*(cf. 6146.11 - Alternative Credits Toward Graduation)*

The district's physical education program shall engage students in moderate to vigorous physical activity, as defined in the accompanying administrative regulation, for at least 50 percent of class or session time. The Superintendent or designee shall develop strategies to monitor the amount of moderate to vigorous physical activity that takes place in the physical education instructional program.

The Superintendent or designee shall ensure that the district's program provides students with equal opportunities for instruction and participation regardless of gender in accordance with law.

*(cf. 0410 - Nondiscrimination in District Programs and Activities)*

BP 6142.7(b)

### **PHYSICAL EDUCATION AND ACTIVITY (continued)**

Students with disabilities shall be provided instruction in physical education in accordance with their individualized education program or Section 504 accommodation plan.

*(cf. 6159 - Individualized Education Program)*  
*(cf. 6164.6 - Identification and Education Under Section 504)*

During air pollution episodes, extreme weather, or other inclement conditions, physical education staff shall make appropriate adjustments to the program or shall seek alternative indoor space to enable students to participate in active physical education.

*(cf. 3514 - Environmental Safety)*  
*(cf. 5141.7 - Sun Safety)*

~~The Superintendent or designee shall develop strategies to supplement physical education instruction with additional opportunities for students to be physically active before, during, and after the school day.~~

*(cf. 1330.1 - Joint Use Agreements)*  
*(cf. 5142.2 - Safe Routes to School Program)*  
*(cf. 5148 - Child Care and Development Program)*  
*(cf. 5148.2 - Before/After School Programs)*  
*(cf. 6145 - Extracurricular and Cocurricular Activities)*

### **Staffing**

Physical education instruction shall be delivered by appropriately credentialed teachers who may be assisted by instructional aides, paraprofessionals, and/or volunteers.

*(cf. 1240 - Volunteer Assistance)*  
*(cf. 4112.2 - Certification)*  
***(cf. 4112.21 - Interns)***  
*(cf. 4113 - Assignment)*  
*(cf. 4222 - Teacher Aides/Paraprofessionals)*

The district shall provide physical education teachers with continuing professional development, including classroom management and instructional strategies designed to keep students engaged and active and to enhance the quality of physical education instruction and assessment.

*(cf. 4131 - Staff Development)*  
*(cf. 5121 - Grades/Evaluation of Student Achievement)*

BP 6142.7(c)

## PHYSICAL EDUCATION AND ACTIVITY (continued)

### Physical Fitness Testing

The Superintendent or designee shall annually administer the physical fitness test designated by the State Board of Education (**FITNESSGRAM**) to students in grades 5, 7, and 9. (Education Code 60800; 5 CCR 1041)

### Temporary Exemptions

The Superintendent or designee may grant **a student** a temporary exemption from physical education under either of the following conditions: (Education Code 51241)

1. The student is ill or injured and a modified program to meet his/her needs cannot be provided.
2. The student is enrolled for one-half time or less.

### ~~Two-Year Exemptions~~

~~With the student's consent, the Superintendent or designee may exempt a student from physical education courses for any two years during grades 10-12 provided that the student has satisfactorily met at least five of the six standards of the state's physical fitness test **FITNESSGRAM** in grade 9. (Education Code 51241)~~

~~Upon request by students and/or their parents/guardians, the Superintendent or designee may administer the physical fitness test **FITNESSGRAM** to students in grades 10-12 who need to pass the test in order to qualify for a two-year exemption from physical education courses.~~

~~Students in grades 10-12 who have been granted a two-year exemption pursuant to Education Code 51241(b) shall be offered a variety of elective physical education courses of not less than 400 minutes each 10 school days. (Education Code 51222)~~

~~Students in grades 10-12 who have been granted a two-year or permanent exemption from physical education **courses** pursuant to Education Code 51241(b)(1) or (e) **Such students** shall not be permitted to attend fewer total hours of courses and classes than they would have attended if enrolled in a physical education course. (Education Code 51241)~~

~~(cf. 6112 - School Day)~~

### Permanent Exemptions

~~The Superintendent or designee may grant **a student** a permanent exemption from physical education to an individual student under any of the following conditions: (Education Code 51241)~~



BP 6142.7(d)

### PHYSICAL EDUCATION AND ACTIVITY (continued)

1. ~~The student is age 16 years or older and has been enrolled in grade 10 for one or more academic years. **However, such a student** Students in grades 10-12 who have been granted a two-year or permanent exemption from physical education pursuant to Education Code 51241(b)(1) or (e) shall not be permitted to attend fewer total hours of courses and classes than ~~they~~ **he/she** would have attended if enrolled in a physical education course. (Education Code 51241)~~
2. ~~The student is enrolled as a postgraduate student.~~
3. ~~The student is enrolled in a juvenile home, ranch, camp, or forestry camp school with scheduled recreation and exercise.~~

### Other Exemptions

The Superintendent or designee may grant **a student** an exemption from physical education under the following special circumstances:

1. ~~**When** the student is in **any of** grades 10-12 **and** is excused for up to 24 clock hours in order to participate in automobile driver training. **However, any such student shall attend a minimum of 7,000 minutes of physical education instruction during the school year.** (Education Code 51222)~~
2. ~~**When** the student is in **any of** grades 10-12, attends a regional occupational center or program, and, attendance in physical education courses results in hardship because of the travel time involved, **would experience hardship to attend physical education courses.** Students in a regional occupational program or center who are exempted from physical education pursuant to Education Code 52316 **Any such student** shall have a minimum school day of 180 minutes. (Education Code 52316)~~
3. ~~**When** the student is in high school and is engaged in a regular school-sponsored interscholastic athletic program carried on wholly or partially after regular school hours. (Education Code 51242)~~

~~(cf. 6178.2 - Regional Occupational Center/Program)~~

~~(cf. 6145.2 - Athletic Competition)~~

### Program Evaluation

The Superintendent or designee shall annually report to the Board ~~the results of the state physical fitness testing for each school and~~ **each school's FITNESSGRAM results for each** applicable grade level. He/she shall also report to the Board regarding the number of instructional minutes offered in physical education for each grade level, the number of two-year and permanent exemptions granted pursuant to Education Code 51241, and any other data agreed upon by the

BP 6142.7(e)

**PHYSICAL EDUCATION AND ACTIVITY (continued)**

Board and the Superintendent or designee to evaluate program quality and the effectiveness of the district's program in meeting goals for physical activity.

(cf. 0500 - Accountability)

(cf. 6190 - Evaluation of the Instructional Program)

*Legal Reference:*

EDUCATION CODE

33126 School accountability report card

33350-33354 CDE responsibilities re: physical education

35256 School accountability report card

**44250-44277 Credential types**

49066 Grades; physical education class

51210 Course of study, grades 1-6

51220 Course of study, grades 7-12

51222 Physical education

51223 Physical education, elementary schools

51241 Temporary, two-year or permanent exemption from physical education

51242 Exemption from physical education for athletic program participants

52316 Excuse from attending physical education classes

60800 Physical performance test

CODE OF REGULATIONS, TITLE 5

1040-1048 Physical performance test

3051.5 Adapted physical education for individuals with exceptional needs

**4600-4687 Uniform complaint procedures**

10060 Criteria for high school physical education programs

**80020 Additional assignment authorizations for specific credentials**

**80037 Designated subjects teaching credential; special teaching authorization in physical education**

**80046.1 Added authorization to teach adapted physical education**

UNITED STATES CODE, TITLE 29

794 Rehabilitation Act of 1973, Section 504

UNITED STATES CODE, TITLE 42

1758b Local wellness policy

ATTORNEY GENERAL OPINIONS

53 Ops.Cal.Atty.Gen. 230 (1970)

**COURT DECISIONS**

**Doe v. Albany Unified School District (2010) 190 Cal.App.4th 668**

**Cal200 et al. v. San Francisco Unified School District et al. (2013), San Francisco Superior Court, Case No. CGC-13-534975**

**Cal200 et al. v. Oakland Unified School District et al. (San Francisco Superior Court, Case No. CPF-14-513959**

*Management Resources: (see next page)*

BP 6142.7(f)

**PHYSICAL EDUCATION AND ACTIVITY (continued)***Management Resources:*CSBA PUBLICATIONS*Districts at Risk from Lawsuits Regarding PE Instructional Minute Requirement, Legal Alert, May 2015**Monitoring for Success: A Guide for Assessing and Strengthening Student Wellness Policies, 2012**Student Wellness Policy Implementation Monitoring Report and Guide, 2007**Student Wellness: A Healthy Food and Physical Activity Policy Resource Guide, rev. April 2006-2012**Active Bodies, Active Minds: Physical Activity and Academic Achievement, Fact Sheet, February 2010**Maximizing Opportunities for Physical Activity Through Joint Use of Facilities, Policy Brief, rev. February 2010**Maximizing Opportunities for Physical Activity During the School Day, Fact Sheet, November 2009**Moderate to Vigorous Physical Activity in Physical Education to Improve Health and Academic Outcomes, Fact Sheet, November 2009**Physical Education and California Schools, Policy Brief, rev. October 2007*CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS*Physical Education Framework for California Public Schools: Kindergarten Through Grade 12, 2009**Physical Education Model Content Standards for California Public Schools: Kindergarten Through Grade 12, January 2005**Adapted Physical Education Guidelines for California Schools, 2003*CENTERS FOR DISEASE CONTROL AND PREVENTION PUBLICATIONS*School Health Index (SHI): for Physical Activity and Healthy Eating: A Self-Assessment and Planning Guide 2014 for Elementary and Middle/High Schools, 2000*COMMISSION ON TEACHER CREDENTIALING PUBLICATIONS*The Administrator's Assignment Manual, 2007*U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES PUBLICATIONS*2008 Physical Activity Guidelines for Americans, October 2008*WEB SITESCSBA: <http://www.csba.org>California Department of Education, Physical Fitness Testing: <http://www.cde.ca.gov/ta/tg/pf>California Healthy Kids Resource Center: <http://www.californiahealthykids.org>

California Project LEAN (Leaders Encouraging Activity and Nutrition):

<http://www.californiaprojectlean.org>Centers for Disease Control and Prevention: <http://www.cdc.gov>Commission on Teacher Credentialing: <http://www.ctc.ca.gov>Educational Data System, California physical fitness: <http://www.eddata.com/projects/current/cpf>Healthy People 2010: <http://www.healthypeople.gov>National Association for Sport and Physical Education: <http://www.aahperd.org/naspe>President's Council on Physical Fitness and Sports: <http://www.fitness.gov>U.S. Department of Health and Human Services: <http://www.health.gov>

# CSBA Sample Administrative Regulation

**Instruction** AR 6142.7(a)

## PHYSICAL EDUCATION AND ACTIVITY

### Definitions

*Physical education* is a sequential educational program that teaches students to understand and participate in regular physical activity for developing and maintaining physical fitness throughout their ~~lifetimes~~ **lifetime**, understand and improve their motor skills, enjoy using their skills and knowledge to establish a healthy lifestyle, and understand how their bodies work.

*Physical activity* is bodily movement that is produced by the contraction of skeletal muscle and that substantially increases energy expenditure, including exercise, sport, dance, and other movement forms.

*Moderate physical activity* is any activity which generally requires sustained, rhythmic movements and refers to a level of effort a healthy individual might expend while, for example, walking briskly, dancing, swimming, or bicycling on level terrain. A person should feel some exertion but should be able to carry on a conversation comfortably during the activity.

*Vigorous physical activity* is any activity which generally requires sustained, rhythmic movements and refers to a level of effort a healthy individual might expend while, for example, jogging, participating in high-impact aerobic dancing, swimming continuous laps, or bicycling uphill. Vigorous physical activity may be intense enough to result in a significant increase in heart and respiration rate.

### Instructional Time

**OPTION 1: (Elementary Districts with any of Grades 1-8)**

**Instruction in physical education shall be provided for a total period of time of not less than 200 minutes each 10 school days. (Education Code 51210, 51223)**

**OPTION 2: (High School Districts)**

**Instruction in physical education shall be provided for a total period of time of not less than 400 minutes each 10 school days. (Education Code 51222)**

**OPTION 3: (Unified School Districts)**

~~Instruction in physical education shall be provided for a total period of time of not less than 200 minutes each 10 school days for students in grades 1-6 and not less than 400 minutes each 10 school days for students in grades 7-12. (Education Code 51210, 51222)~~

**Instruction in physical education shall be provided for at least the following minimum period of time: (Education Code 51210, 51222, 51223)**

- 1. For students in grades 1-6, 200 minutes each 10 school days, exclusive of recesses and the lunch period**
- ~~2. For students in grades 7-8 attending an elementary school, 200 minutes each 10 school days, exclusive of recesses and the lunch period~~
- ~~3. For students in grades 7-8 attending a middle school or junior high school, 400 minutes each 10 school days~~
- ~~4. For students in grades 9-12, 400 minutes each 10 school days~~

**If the instructional minute requirement cannot be met during any 10-day period due to inclement weather, a school assembly, field trip, student assessment, or other circumstance, the school shall make up those minutes on another day in order to satisfy the instructional minute requirement.**

**The Superintendent or designee shall determine a method to document compliance with the required number of instructional minutes. Such documentation may include, but not be limited to, a master schedule, teacher roster, or log for staff or students to record the number of physical education minutes completed.**

**Any complaint alleging noncompliance with the instructional minute requirement for elementary schools may be filed in accordance with the district's procedures in AR 1312.3 - Uniform Complaint Procedures. A complainant not satisfied with the district's decision may appeal the decision to the California Department of Education (CDE). If the district or the CDE finds merit in a complaint, the district shall provide a remedy to all affected students and parents/guardians. (Education Code 51210, 51223; 5 CCF 4600-4687)**

*(cf. 1312.3 - Uniform Complaint Procedures)*

### **Monitoring Moderate to Vigorous Physical Activity**

To monitor whether students are engaged in moderate to vigorous physical activity for at least 50 percent of physical education class or session time, the Superintendent or designee may:

1. Develop methods to estimate the amount of time students spend in moderate to vigorous physical activity or the number of students who are inactive during physical education classes

AR 6142.7(b)

**PHYSICAL EDUCATION AND ACTIVITY** (continued)

2. Provide physical education teachers with staff development, self-monitoring tools, stopwatches, and/or heart rate monitors to assist them in planning and assessing the level of activity in their classes

*(cf. 4115 - Evaluation/Supervision)*

**Physical Fitness Testing**

During the annual assessment window between the months of February through May, students in grades 5, 7, and 9 shall be administered the physical fitness test designated by the State Board of Education (**FITNESSGRAM**). (Education Code 60800; 5 CCR 1041)

*(cf. 6162.5 - Student Assessment)*

The Superintendent or designee may provide a make-up date for students who are unable to take the test based on absence or temporary physical restriction or limitations, such as students recovering from illness or injury. (5 CCR 1043)

On or before November 1 of each school year, the Superintendent may designate an employee to serve as the district's physical fitness test coordinator and so notify the test contractor. The test coordinator shall serve as the liaison between the district and California Department of Education for all matters related to the physical fitness test. His/her duties shall be those specified in 5 CCR 1043.4, including, but not limited to, overseeing the administration of the test and the collection and return of all test data to the test contractor. (5 CCR 1043.4)

Students shall be provided with their individual results after completing the ~~physical performance testing~~ **FITNESSGRAM**. The test results may be provided in writing or orally as the student completes the testing and shall be included in his/her cumulative record. (Education Code 60800; 5 CCR 1043.10, 1044)

*(cf. 5125 - Student Records)*

Each student's test results shall also be provided to his/her parents/guardians.

The Superintendent or designee shall report the aggregate results of the ~~physical fitness testing~~ **FITNESSGRAM** in the annual school accountability report card required by Education Code 33126 and 35256. (Education Code 60800)

*(cf. 0510 - School Accountability Report Card)*

AR 6142.7(c)

**PHYSICAL EDUCATION AND ACTIVITY** (continued)

**Testing Variations**

All students may be administered the ~~state's physical fitness test~~ **FITNESSGRAM** with the following test variations: (5 CCR 1047)

1. Extra time within a testing day
2. Test directions that are simplified or clarified

All students may have the following test variations if they are regularly used in the classroom: (5 CCR 1047)

1. Audio amplification equipment
2. Separate testing for individual students provided that they are directly supervised by the test examiner
3. Manually Coded English or American Sign Language to present directions for test administration

Students with a physical disability and students who are physically unable to take all of the test shall undergo as much of the test as their physical condition will permit. (Education Code 60800; 5 CCR 1047)

Students with disabilities may be provided the following accommodations if specified in their individualized education program (IEP) or Section 504 plan: (5 CCR 1047)

1. Administration of the test at the most beneficial time of day to the student after consultation with the test contractor
2. Administration of the test by a test examiner to the student at home or in the hospital
3. Any other accommodation specified in the student's IEP or Section 504 plan for the physical fitness test

*(cf. 6159 - Individualized Education Program)*

*(cf. 6164.6 - Identification and Education Under Section 504)*

Identified English learners may be allowed the following additional test variations if regularly used in the classroom: (5 CCR 1048)

1. Separate testing with other English learners, provided that they are directly supervised by the test examiner

AR 6142.7(d)

**PHYSICAL EDUCATION AND ACTIVITY** (continued)

2. Test directions translated into their primary language, and the opportunity to ask clarifying questions about the test directions in their primary language

**Additional Opportunities for Physical Activity**

The Superintendent or designee shall implement strategies for increasing opportunities for physical activity outside the physical education program, which may include, but not be limited to:

1. Training recess and lunch supervisors on methods to engage students in moderate to vigorous physical activity

*(cf. 1240 - Volunteer Assistance)*

*(cf. 4231 - Staff Development)*

*(cf. 5030 - Student Wellness)*

2. Encouraging teachers to incorporate physical activity into the classroom
3. Establishing extracurricular activities that promote physical activity, such as school clubs, intramural athletic programs, dance performances, special events, and competitions

*(cf. 6145 - Extracurricular and Cocurricular Activities)*

*(cf. 6145.5 - Student Organizations and Equal Access)*

4. Incorporating opportunities for physical activity into before- or after-school programs and/or child care and development programs

*(cf. 5148 - Child Care and Development Program)*

*(cf. 5148.2 - Before/After School Programs)*

AR 6142.7(g)

5. Exploring opportunities for joint use of facilities or grounds in order to provide adequate space for students and community members to engage in recreational activities

*(cf. 1330.1 - Joint Use Agreements)*

6. Developing business partnerships to maximize resources for physical activity equipment and programs

*(cf. 1700 - Relations Between Private Industry and the Schools)*

7. Developing programs to encourage and facilitate walking, bicycling, or other active transport to and from school

*(cf. 5142.2 - Safe Routes to School Program)*



# CSBA Sample Board Policy

**Instruction** BP 6142.93(a)

## SCIENCE INSTRUCTION

The Governing Board believes that science education should focus on giving students an understanding **of the biological and physical aspects of science, of key scientific concepts, and a capacity for methods of scientific inquiry and investigation ways of thinking.** Students should become familiar with the natural world and the interrelationship of science, mathematics, **and technology, and engineering.** As part of **their** science instruction, students should learn how to apply scientific knowledge and **reasoning ways of thinking for individual and social purposes.**

*(cf. 0440 - District Technology Plan)*

*(cf. 5145.8 - Refusal to Harm or Destroy Animals)*

*(cf. 6142.92 - Mathematics Instruction)*

*(cf. 6143 - Courses of Study)*

*(cf. 6146.1 - High School Graduation Requirements)*

**Philosophical and religious theories that are based, at least in part, on faith and are not subject to scientific test and refutation shall not be discussed during science instruction.**

*(cf. 6141.2 - Recognition of Religious Beliefs and Customs)*

**The district's academic standards for science instruction shall meet or exceed the California Next Generation Science Standards (CA-NGSS). The Superintendent or designee shall ensure that curricula used in district schools are aligned with these standards and the state curriculum framework.**

*(cf. 6011 - Academic Standards)*

*(cf. 6141 - Curriculum Development and Evaluation)*

*(cf. 6161.1 - Selection and Evaluation of Instructional Materials)*

**The Superintendent or designee shall ensure that students have access to and are enrolled in a broad course of study including science courses.**

*(cf. 0460 - Local Control and Accountability Plan)*

**The Superintendent or designee shall provide certificated staff with opportunities to participate in professional development activities designed to enhance their knowledge of district-adopted academic standards, instructional strategies for teaching science, and changes in scientific theories.**

*(cf. 4131 - Staff Development)*

*(cf. 4331 - Staff Development)*

BP 6142.93(b)

### SCIENCE INSTRUCTION (continued)

As a matter of principle, science teachers are professionally bound to limit their teaching to content that meets the criteria of scientific fact, hypothesis and theory as these terms are used in natural sciences. A scientific fact is an understanding based on confirmable observations and is subject to test and rejection. A scientific hypothesis is an attempt to frame a question as a testable proposition. A scientific theory organizes and explains a range of natural phenomena on the basis of facts and hypotheses. Scientific theories are constantly subject to testing, modification and refutation as new evidence and new ideas emerge.

Philosophical and religious theories are based, at least in part, on faith and are not subject to scientific test and refutation. Such beliefs shall not be discussed in science classes, but may be addressed in the social science and language arts curricula.

*(cf. 6141.2 - Recognition of Religious Beliefs and Customs)*

*(cf. 6142.91 - Reading/Language Arts Instruction)*

The Superintendent or designee shall develop and implement appropriate safety measures for science laboratory classes, including, but not limited to, staff and student safety training, use of eye safety devices, hearing protection, first aid procedures, regular equipment maintenance, safe use of heat sources, safe use and disposal of hazardous chemicals, proper ventilation, prevention of exposure to bloodborne pathogens from sharp instruments, fire prevention and control, an emergency response plan, and evacuation procedures. Parents/guardians shall be informed of the types of science laboratory activities that will be conducted and encouraged to sign consent forms for their child's participation.

*(cf. 3514.1 - Hazardous Substances)*

*(cf. 4119.42/4219.42/4319.42 - Exposure Control Plan for Bloodborne Pathogens)*

*(cf. 4157/4257/4357- Employee Safety)*

*(cf. 5142 - Safety)*

The Superintendent or designee shall regularly report to the Board regarding the implementation and effectiveness of the science curriculum at each grade level. At a minimum, each report shall address the extent to which the program is aligned with the CA-NGSS, any applicable student assessment results, and feedback from students, parents/guardians, and staff regarding the program.

*(cf. 0500 - Accountability)*

*(cf. 6162.51 - State Academic Achievement Tests)*

*Legal Reference: (see next page)*

BP 6142.93(c)

**SCIENCE INSTRUCTION (continued)**

*Legal Reference:*

EDUCATION CODE

**8774 Residential outdoor science program**

**32030-32034 Eye safety**

**32255-32255.6 Student's right to refrain from harmful or destructive use of animals**

**33475-33475.5 Model curriculum on stem cell science**

**49340-49341 Hazardous substances education**

**51210 Areas of study, grades 1 through 6**

**51210.3 Elementary science coach**

**51220 Areas of study, grades 7 through 12**

**51225.3 High school graduation**

**52060-52077 Local control and accountability plan**

**60640-60649 California Assessment of Student Performance and Progress**

CODE OF REGULATION, TITLE 5

**14030 Science laboratories, design specifications**

CODE OF REGULATIONS, TITLE 8

**5191 Occupational exposure to hazardous chemicals in laboratories; chemical hygiene plan**

*Management Resources:*

CSBA PUBLICATIONS

**Supporting Implementation of the California Next Generation Science Standards (CA-NGSS),**

**Governance Brief, November 2016**

CDE CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS

**Science Framework for California Public Schools: Kindergarten Through Grade Twelve, 1999 2016**

**Next Generation Science Standards Systems Implementation Plan for California, 2014**

**California Next Generation Science Standards, 2013**

**Science Safety Handbook for California Public Schools, 2012**

SBE POLICIES

**Policy Statement on the Teaching of Natural Sciences, January 13, 1989**

WEB SITES

**CSBA: <http://www.csba.org>**

**California Alliance for Next Generation Science Standards: <http://cdefoundation.org/stem/ca4ngss>**

**California Department of Education: <http://www.cde.ca.gov>**

**California Science Teachers Association: <http://www.cascience.org>**

**U.S. Department of Education, STEM Education: <http://www.ed.gov/stem>**

# CSBA Sample Board Policy

**Instruction** BP 6153(a)

## SCHOOL-SPONSORED TRIPS

The Governing Board recognizes that **school-sponsored field trips are an important component of a student's development and supplement and enrich the classroom learning experience, lead to increased student achievement, and foster student engagement. The Board encourages field trips to reinforce and increase learning opportunities and to enhance district programs.**

*(cf. 0460 - Local Control and Accountability Plan)*

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

*(cf. 6143 - Courses of Study)*

*(cf. 6145 - Extracurricular and Cocurricular Activities)*

*(cf. 6145.2 - Athletic Competition)*

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

*(cf. 3312.2 - Educational Travel Program Contracts)*

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

*(cf. 3530 - Risk Management/Insurance)*

*(cf. 3541.1 - Transportation for School-Related Trips)*

*(cf. 5142 - Safety)*

*(cf. 5143 - Insurance)*

*(cf. 5144 - Discipline)*

*(cf. 5144.1 - Suspension and Expulsion/Due Process)*

**Instruction** BP 6153(b)**SCHOOL-SPONSORED TRIPS (continued)**

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

*(cf. 1230 - School-Connected Organizations)*

*(cf. 1321 - Solicitation of Funds from and by Students)*

*(cf. 1700 - Relations Between Private Industry and the Schools)*

**The Board may approve the use of district funds shall not be used to pay for** student expenses for **in-state, out-of-state, or out-of-country field trips or excursions when permitted by law.** **However, In addition,** expenses of instructors, chaperones, and other personnel participating in such trips, as well as incidental expenses for the use of district equipment during the trip, may be paid from district funds. (Education Code 35330)

*Legal Reference:*EDUCATION CODE

8760 *Authorization of outdoor science and conservation programs*

32040-32044 *First aid equipment: field trips*

35330 *Excursions and field trips*

35331 *Provision for medical or hospital service for pupils (on field trips)*

35332 *Transportation by chartered airline*

35350 *Transportation of students*

44808 *Liability when pupils not on school property*

48908 *Duties of pupils; authority of teachers*

BUSINESS AND PROFESSIONS CODE

~~17540 *Travel promoters*~~

17550-17550.9 *Sellers of travel*

17552-17556.5 *Educational travel organizations*

*Management Resources:*WEB SITES

*American Red Cross: <http://www.redcross.org>*

*California Association of Directors of Activities: <http://www.cada1.org>*

*U.S. Department of Homeland Security: <http://www.dhs.gov>*

# CSBA Sample Board Policy

Instruction BP 6154(a)

## HOMEWORK/MAKEUP WORK

The Governing Board recognizes that homework contributes toward building responsibility, self-discipline, and life long learning habits, and that time spent on homework directly influences students' ability to meet the district's academic standards. The Board expects students, parents/guardians and staff to view homework as a routine and important part of students' daily lives. **The Governing Board recognizes that meaningful homework assignments can be a valuable extension of student learning time and assist students in developing good study habits. Homework shall be assigned when necessary to support classroom lessons, enable students to complete unfinished assignments, or review and apply academic content for better understanding.**

*(cf. 6011 - Academic Standards)*

The principal and staff at each school **Superintendent or designee shall collaborate with school administrators and teachers to develop and regularly review a school site homework plan which includes guidelines for the assignment of homework and describes the related responsibilities of students, staff, and parents/guardians.**

**Homework assignments shall be reasonable in length and appropriate to the grade level and course. The Board expects that the number, frequency, and degree of difficulty of homework assignments will increase with the grade level and the maturity of students. Teachers shall assign homework only as necessary to fulfill academic goals and reinforce current instruction.**

*(cf. 6011 - Academic Standards)*

The Superintendent or designee shall ensure that administrators and teachers develop and implement an effective homework plan at each school site. As needed, teachers may receive training in designing relevant, challenging and meaningful homework assignments that reinforce classroom learning objectives. **Teachers' expectations related to homework may be addressed in their evaluations.**

*(cf. 4115 - Evaluation/Supervision)*

*(cf. 4131 - Staff Development)*

**Although on-time completion of homework is important to maintain academic progress, the Board recognizes that students learn at different rates. Students shall receive credit for work that is completed late in order to encourage their continued learning.**

BP 6154(b)

### **HOMEWORK/MAKEUP WORK (continued)**

**Age-appropriate instruction may be given to help students allocate their time wisely, meet their deadlines, and develop good personal study habits.**

**At the beginning of the school year, teachers shall communicate homework expectations to students and their parents/guardians. Homework guidelines also shall be included in student and/or parent handbooks. These communications shall include the manner in which homework relates to achievement of academic standards and course content, the impact of homework assignments on students' grades, any school resources and programs that are available to provide homework support, and ways in which parents/guardians may appropriately assist their children.**

Although it is the student's responsibility to ~~do most~~ **undertake** assignments independently, ~~the Board expects teachers at all grade levels to use parents/guardians as a contributing resource.~~ **parents/guardians may serve as a resource and are encouraged to ensure that their child's homework assignments are completed.** When a student repeatedly fails to ~~do their~~ **complete his/her** homework, **the teacher shall notify** the student's parents/guardians **as soon as possible so that corrective action can be taken prior to the release of any final grades or report cards.** ~~shall be notified and asked to contact the teacher.~~

*(cf. 5020 - Parent Rights and Responsibilities)*

*(cf. 6020 - Parent Involvement)*

To further support students' homework efforts, the Superintendent or designee may establish and maintain telephone help lines, **provide access to school library media centers and technological resources**, and/or **provide before-school and after-school centers programs** where students can receive ~~encouragement and clarification about homework assignments~~ **assistance** from teachers, volunteers, and/or **student tutors** ~~more advanced students who are performing community service.~~ The Board encourages the Superintendent or designee to design class and transportation schedules that will enable students to make use of homework support services.

*(cf. 1240 - Volunteer Assistance)*

*(cf. 1700 - Relations between Private Industry and the Schools)*

*(cf. 3541 - Transportation Routes and Services)*

*(cf. 5148 - Child Care and Development)*

***(cf. 5148.2 - Before/After School Programs)***

*(cf. 6112 - School Day)*

*(cf. 6142.4 - Service Learning/Community Service Classes)*

***(cf. 6163.1 - Library Media Centers)***

**Teachers shall review all completed homework to assess the student's understanding of academic content and shall provide timely feedback to the student.**

BP 6154(c)

## **HOMEWORK/MAKEUP WORK (continued)**

### **Makeup Work**

Students who miss school work ~~because of an excused absence~~ shall be given the opportunity to complete all assignments and tests that can be reasonably provided. As determined by the teacher, the assignments and tests shall be reasonably equivalent to, but not necessarily identical to, the assignments and tests missed during the absence. Students shall receive full credit for work satisfactorily completed within a reasonable period of time. ~~(Education Code 48205)~~

The Superintendent or designee shall notify parents/guardians that no student may have his/her grade reduced or lose academic credit for any excused absence when missed assignments and tests are satisfactorily completed within a reasonable period of time. Such notification shall include the full text of Education Code 48205. (Education Code 48980)

*(cf. 5121 - Grades/Evaluation of Student Achievement)*

*(cf. 5145.6 - Parental Notifications)*

The teacher of any class from which a student is suspended may require the student to complete any assignments and tests missed during the suspension. (Education Code 48913)

*(cf. 5144.1 - Suspension and Expulsion/Due Process)*

*Legal Reference:*

#### EDUCATION CODE

**8420-8428 21st Century High School After School Safety and Enrichment for Teens**

**8482-8484.65 After School Education and Safety Program**

**8484.7-8484.9 21st Century Community Learning Centers**

48205 Absences for personal reasons

48913 Completion of work missed by suspended student

48980 Parental notifications

~~58700-58702 Tutoring and homework assistance program; summer school apportionment credit~~

**UNITED STATES CODE, TITLE 20**

**7171-7176 21st Century Community Learning Centers**

*Management Resources:*

#### SBE POLICIES

*Parent Involvement in the Education of Their Children, 1994*

*Policy Statement on Homework, 1995*

#### CSBA PUBLICATIONS

***Research-Supported Strategies to Improve the Accuracy and Fairness of Grades, Governance Brief, July 2016***

#### WEB SITES

**CSBA: <http://www.csba.org>**

**California State PTA: <http://www.capta.org>**



# CSBA Sample Board Policy

**Instruction** BP 6161.1(a)

## **SELECTION AND EVALUATION OF INSTRUCTIONAL MATERIALS**

The Governing Board desires that district instructional materials, as a whole, present a broad spectrum of knowledge and viewpoints, reflect society's diversity, and enhance the use of multiple teaching strategies and technologies. The Board shall adopt instructional materials based on a determination that such materials are an effective learning resource to help students achieve grade-level competency and that the materials meet criteria specified in law. Textbooks, technology-based materials, and other educational materials shall be aligned with academic content standards and the district's curriculum to ensure that they effectively support the district's adopted courses of study.

*(cf. 0440 - District Technology Plan)*  
*(cf. 6000 - Concepts and Roles)*  
*(cf. 6011 - Academic Standards)*  
*(cf. 6141 - Curriculum Development and Evaluation)*  
*(cf. 6143 - Courses of Study)*  
*(cf. 6146.1 - High School Graduation Requirements)*  
*(cf. 6161.11 - Supplementary Instructional Materials)*  
*(cf. 6162.5 - Student Assessment)*  
*(cf. 6163.1 - Library Media Centers)*

The Board shall select instructional materials for use in grades K-8 that have been approved by the State Board of Education (SBE) or have otherwise been determined to be aligned with the state academic content standards adopted pursuant to Education Code 60605 or the Common Core **State** Standards adopted pursuant to Education Code 60605.8. (Education Code 60200, 60210)

### **Review Process**

The Superintendent or designee shall establish a process by which instructional materials shall be reviewed for recommendation to the Board. Toward that end, he/she may establish an instructional materials review committee to evaluate and recommend instructional materials.

*(cf. 1220 - Citizen Advisory Committees)*

The review process shall involve teachers in a substantial manner and shall encourage the participation of parents/guardians and community members. (Education Code 60002)

In addition, the instructional materials review committee may include administrators, other staff who have subject-matter expertise, and students as appropriate.

BP 6161.1(b)

### **SELECTION AND EVALUATION OF INSTRUCTIONAL MATERIALS (continued)**

If the district chooses to use instructional materials for grades K-8 that have not been adopted by the SBE, the Superintendent or designee shall ensure that a majority of the participants in the district's review process are classroom teachers who are assigned to the subject area or grade level of the materials. (Education Code 60210)

Individuals who participate in the selection or review of instructional materials shall not have a conflict of interest, as defined in administrative regulation, in the materials being reviewed.

*(cf. 9270 - Conflict of Interest)*

The committee shall review instructional materials using criteria provided in law and administrative regulation, and shall provide the Board with documentation supporting its recommendations.

All recommended instructional materials shall be available for public inspection at the district office.

*(cf. 5020 - Parent Rights and Responsibilities)*

The district may pilot instructional materials, using a representative sample of classrooms for a specified period of time during a school year, in order to determine how well the materials support the district's curricular goals and academic standards. Feedback from teachers piloting the materials shall be made available to the Board before the materials are adopted.

### **Public Hearing on Sufficiency of Instructional Materials**

The Board shall annually conduct one or more public hearings on the sufficiency of the district's textbooks and other instructional materials. (Education Code 60119)

The hearing shall be held on or before the end of the eighth week from the first day students attend school for that year. (Education Code 60119)

The Board encourages participation by parents/guardians, teachers, interested community members, and bargaining unit leaders at the hearing. Ten days prior to the hearing, the Superintendent or designee shall post a notice in three public places within the district containing the time, place, and purpose of the hearing. The hearing shall not take place during or immediately following school hours. (Education Code 60119)

*(cf. 9322 - Agenda/Meeting Materials)*

At the hearing(s), the Board shall determine, through a resolution, whether each student in each school, including each English learner, has sufficient textbooks or instructional materials which are aligned to the state content standards adopted pursuant to Education Code 60605 or the Common Core **State** Standards adopted pursuant to Education Code 60605.8 and which are

BP 6161.1(c)

**SELECTION AND EVALUATION OF INSTRUCTIONAL MATERIALS** (continued)

consistent with the content and cycles of the state's curriculum frameworks. Sufficiency of instructional materials shall be determined in each of the following subjects: (Education Code 60119)

1. Mathematics

*(cf. 6142.92 - Mathematics Instruction)*

2. Science

*(cf. 6142.93 - Science Instruction)*

3. History-social science

*(cf. 6142.94 - History-Social Science Instruction)*

4. English language arts, including the English language development component of an adopted program

*(cf. 6142.91 - English/Language Arts Instruction)*  
*(cf. 6174 - Education for English Language Learners)*

5. **World/ff** Foreign language

*(cf. 6142.2 - World/Foreign Language Instruction)*

6. Health

*(cf. 6142.8 - Comprehensive Health Education)*

In making these determinations, the Board shall consider whether each student has sufficient textbooks and/or instructional materials to use in class and to take home. However, this does not require that each student have two sets of materials. The materials may be in a digital format as long as each student, at a minimum, has and can access the same materials in the

class and to take home as all other students in the same class or course in the district and has the ability to use and access them at home. However, the materials shall not be considered sufficient if they are photocopied sheets from only a portion of a textbook or instructional materials copied to address a shortage. (Education Code 60119)

If the Board determines that there are insufficient textbooks or instructional materials, it shall provide information to classroom teachers and to the public setting forth, for each school in which an insufficiency exists, the percentage of students who lack sufficient standards-aligned textbooks or instructional materials in each subject area and the reasons that each

BP 6161.1(d)

## SELECTION AND EVALUATION OF INSTRUCTIONAL MATERIALS (continued)

student does not have sufficient textbooks or instructional materials. The Board shall take any action, except an action that would require reimbursement by the Commission of State Mandates, to ensure that each student has sufficient materials within two months of the beginning of the school year in which the determination is made. (Education Code 60119)

**The degree to which every student has sufficient access to standards-aligned instructional materials shall be included in the district's local control and accountability plan. (Education Code 52060)**

*(cf. 0460 - Local Control and Accountability Plan)*

### Complaints

Complaints concerning instructional materials shall be handled in accordance with law, Board policy, and administrative regulation.

*(cf. 1312.2 - Complaints Concerning Instructional Materials)*

*(cf. 1312.4 - Williams Uniform Complaint Procedures)*

### Legal Reference:

#### EDUCATION CODE

220 Prohibition against discrimination

1240 County superintendent, general duties

~~1240.3~~ Definition of sufficiency for categorical flexibility

33050-33053 General waiver authority

33126 School accountability report card

35272 Education and athletic materials

~~42605~~ Tier 3 categorical flexibility

44805 Enforcement of course of studies; use of textbooks, rules and regulations

49415 Maximum textbook weight

51501 Nondiscriminatory subject matter

**52060-52077 Local control and accountability plan**

60000-60005 Instructional materials, legislative intent

60010 Definitions

60040-60052 Instructional requirements and materials

60060-~~60062~~ **60063.5** Requirements for publishers and manufacturers

60070-60076 Prohibited acts (re instructional materials)

60110-60115 Instructional materials on alcohol and drug education

60119 Public hearing on sufficiency of materials

60200-60210 Elementary school materials

60226 Requirements for publishers and manufacturers

60350-60352 Core reading program instructional materials

60400-60411 High school textbooks

60510-60511 Donation for sale of obsolete instructional materials

60605 State content standards

60605.8 Common Core **State** Standards

60605.86-60605.88 Supplemental instructional materials aligned with Common Core **State** Standards

BP 6161.1(e)

**SELECTION AND EVALUATION OF INSTRUCTIONAL MATERIALS (continued)**

CODE OF REGULATIONS, TITLE 5  
9505-9530 Instructional materials

*Management Resources:*

CSBA PUBLICATIONS

Flexibility Provisions in the 2008 and 2009 State Budget: Policy Considerations for Governance Teams, Budget Advisory, March 2009

CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS

Instructional Materials FAQ

01-05 Guidelines for Piloting Textbooks and Instructional Materials, ~~September 2004~~ rev. January 2015  
Standards for Evaluating Instructional Materials for Social Content, 2000-2013

WEB SITES

CSBA: <http://www.csba.org>

Association of American Publishers: <http://www.publishers.org>

California Academic Content Standards Commission, Common Core **State** Standards:  
<http://www.scoe.net/castandards>

California Department of Education: <http://www.cde.ca.gov>

# CSBA Sample Exhibit

**Instruction** E 6161.1(a)

## SELECTION AND EVALUATION OF INSTRUCTIONAL MATERIALS

### Resolution On Sufficiency Of Instructional Materials

Whereas, the Governing Board of the National School District in order to comply with the requirements of Education Code 60119, held a public hearing on *(date)*, at *(time)* o'clock, which is on or before the eighth week of school (between the first day that students attend school and the end of the eighth week from that day) and which did not take place during or immediately following school hours, and;

Whereas, the Board provided at least 10 days notice of the public hearing by posting it in at least three public places within the district stating the time, place, and purpose of the hearing, and;

Whereas, the Board encouraged participation by parents/guardians, teachers, members of the community, and bargaining unit leaders in the public hearing, and;

Whereas, information provided at the public hearing detailed the extent to which sufficient textbooks or instructional materials were provided to all students, including English learners, in the National School District, and;

Whereas, the definition of "sufficient textbooks or instructional materials" means that each student, including each English learner, has a standards-aligned textbook or instructional materials to use in class and to take home, which may include materials in a digital format but shall not include photocopied sheets from only a portion of a textbook or instructional materials copied to address a shortage, and;

Whereas, textbooks or instructional materials in core curriculum subjects should be aligned with state academic content standards adopted by the State Board of Education pursuant to Education Code 60605 and/or the Common Core **State** Standards adopted pursuant to Education Code 60605.8;

### Finding of Sufficient Textbooks or Instructional Materials

Whereas, sufficient standards-aligned textbooks or instructional materials that are consistent with the cycles and content of the curriculum frameworks were provided to each student, including each English learner, in the following subjects:

- Mathematics: *(List adopted textbooks or instructional materials for this subject for each grade level or school as well as applicable state adoption cycle.)*

\_\_\_\_\_

\_\_\_\_\_

E 6161.1(b)

**SELECTION AND EVALUATION OF INSTRUCTIONAL MATERIALS** (continued)

- Science: *(List adopted textbooks or instructional materials for this subject for each grade level or school as well as applicable state adoption cycle.)*

\_\_\_\_\_  
\_\_\_\_\_

- History-social science: *(List adopted textbooks or instructional materials for this subject for each grade level or school as well as applicable state adoption cycle.)*

\_\_\_\_\_  
\_\_\_\_\_

- English Language Arts adopted program: *(List adopted textbooks or instructional materials for this subject English language arts, including the English language development component of an for each grade level or school as well as applicable state adoption cycle.)*

\_\_\_\_\_  
\_\_\_\_\_

- **World/**Foreign language: *(List adopted textbooks or instructional materials for this subject for each grade level or school as well as applicable state adoption cycle.)*

\_\_\_\_\_  
\_\_\_\_\_

- Health: *(List adopted textbooks or instructional materials for this subject for each grade level or school as well as applicable state adoption cycle.)*

\_\_\_\_\_  
\_\_\_\_\_

Therefore, it is resolved that for the (year) school year, the National School District, has provided each student with sufficient standards-aligned textbooks or instructional materials that are consistent with the cycles and content of the curriculum frameworks.

**Finding of Insufficient Textbooks or Instructional Materials**

Whereas, information provided at the public hearing and to the Board at the public meeting detailed that insufficient standards-aligned textbooks or instructional materials were provided to students in the following subjects and grade levels at district schools: *(For each school, list the percentage of students who lack sufficient standards-aligned textbooks or instructional materials in mathematics, science, history-social science, English language arts, **world/**foreign language, and health.)*

\_\_\_\_\_  
\_\_\_\_\_

E 6161.1(c)

**SELECTION AND EVALUATION OF INSTRUCTIONAL MATERIALS** (continued)

Whereas, sufficient textbooks or instructional materials were not provided at each school listed above due to the following reasons: *(For each school at which there is an insufficiency, list the reasons that each student does not have sufficient instructional materials in each subject and grade level listed above.)*

\_\_\_\_\_  
\_\_\_\_\_

Therefore, it is resolved, that for the (*year*) school year, the (*name of school district/county office of education*) has not provided each student with sufficient textbooks or instructional materials that are consistent with the cycles and content of the curriculum framework, and;

Be it further resolved, that the following actions will be taken to ensure that all students have sufficient standards-aligned textbooks or instructional materials in all subjects that are consistent with the cycles and content of the curriculum frameworks within two months of the beginning of the school year in which this determination is made. *(List actions to be taken to resolve insufficiency. See Education Code 60119(a)(2)(B) for other funds that may be used to ensure sufficient instructional materials.)*

\_\_\_\_\_

PASSED AND ADOPTED THIS \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ at a meeting, by the following vote:

AYES: \_\_\_\_\_ NOES: \_\_\_\_\_ ABSENT: \_\_\_\_\_

Attest:

\_\_\_\_\_  
Secretary

\_\_\_\_\_  
President



# CSBA Sample Administrative Regulation

**Instruction** AR 6162.51(a)

## STATE ACADEMIC ACHIEVEMENT TESTS

The Superintendent or designee shall administer the California Assessment of Student Performance and Progress (CAASPP) to all district students at applicable grade levels, except those students exempted by law.

~~The district shall permit any locally funded charter school to administer the CAASPP to its students~~  
**The students of any charter school that receives its state funding allocation through the district shall be tested** in coordination with the testing of district students. In addition, the Superintendent or designee shall arrange for the testing of students in any alternative education program or program conducted off campus, including, but not limited to, non-classroom based programs, continuation schools, independent study, community day schools, county community schools, juvenile court schools, or nonpublic, nonsectarian schools. No test shall be administered in a home or hospital except by a **test administrator or** test examiner. (5 CCR 851)

*(cf. 0420.4 - Charter School Authorization)*

*(cf. 0420.41 - Charter School Oversight)*

*(cf. 6158 - Independent Study)*

*(cf. 6159.2 - Nonpublic, Nonsectarian School and Agency Services for Special Education)*

*(cf. 6181 - Alternative Schools/Programs of Choice)*

*(cf. 6183 - Home and Hospital Instruction)*

*(cf. 6184 - Continuation Education)*

*(cf. 6185 - Community Day School)*

**On or before July 1 of each year, the Superintendent or designee shall identify any district school(s) with students who are unable to access the computer-based assessment of a CAASPP test and shall report the number of such students to the test contractor. If available, a paper and pencil version of the assessment may be administered to such students. (5 CCR 853, 857)**

On or before ~~September 30~~ **July 1** of each year, the Superintendent or designee shall designate a district coordinator who shall oversee all matters related to the testing program and serve as the district representative and liaison with the test contractor and the California Department of Education (CDE). The Superintendent or designee shall also designate a coordinator for each test site. The duties of the district and site test coordinators shall include those specified in 5 CCR 857-858. (5 CCR 857-858)

The Superintendent or designee also shall appoint **trained test administrator(s) to administer the CAASPP achievement tests and** test examiner(s) to administer the ~~state assessments~~ **California Alternate Assessments**. A test examiner shall be ~~an employee or contractor of the district or, for an alternate assessment for students with disabilities, shall be a certificated or~~

AR 6162.51(b)

**STATE ACADEMIC ACHIEVEMENT TESTS** (continued)

~~licensed employee of the school, district, or county office of education.~~ **a certificated or licensed employee of the district or county office of education.** (5 CCR 850)

*(cf. 4112.2 - Certification)*

*(cf. 4113 - Assignment)*

As appropriate, the Superintendent or designee shall assign a specially trained district employee to serve as a test proctor to assist the test examiner; a specially trained district employee, or other person supervised by a district employee, to serve as a translator to translate the test directions into a student's primary language; and a district employee to serve as a scribe to transcribe a student's responses to the format required by the test. A student's parent/guardian **or sibling** shall not be eligible to be that student's translator or scribe. (5 CCR 850)

~~Test coordinators, examiners, proctors, translators, and scribes shall sign a test security agreement or affidavit.~~ **All test administrators, test examiners, proctors, translators, scribes, district and site test coordinators, and other persons having access to any of the CAASPP achievement tests and corresponding test materials, assessment technology platform, or tests administered pursuant to Education Code 60640 shall acknowledge the limited purpose of their access to the achievement tests by signing a test security affidavit. In addition, all district and site test coordinators shall sign a test security agreement before receiving any CAASPP achievement tests and corresponding test materials. The test security affidavit and test security agreement shall be those set forth in 5 CCR 859.** (5 CCR 850, 859)

**Tests Included in the State Assessment System.**

The district shall administer the following CAASPP assessments: (Education Code 60640; **5 CCR 851.5**)

1. The ~~Smarter Balanced Assessment Consortium assessments~~ **CAASPP achievement tests** for English language arts and mathematics in grades 3-8 and 11, except that:

*(cf. 6142.91 - Reading/Language Arts Instruction)*

*(cf. 6142.92 - Mathematics Instruction)*

- a. Recently arrived English learners, defined pursuant to Education Code 60603 as English learners who are in their first 12 months of attending a school in the United States, shall be exempted from taking the English language arts assessment to the extent allowed by federal law. **A recently arrived English learner may be administered the test upon request by his/her parent/guardian.**

*(cf. 6174 - Education for English Language Learners)*

AR 6162.51(c)

**STATE ACADEMIC ACHIEVEMENT TESTS** (continued)

- b. Students with disabilities who are unable to participate in **these the English language arts and mathematics** assessments, even with the resources described in the section "Testing Variations" below, **may shall** be provided an alternate test **in accordance with when designated in** their individualized education program (IEP), as provided in item #3 below.

*(cf. 6159 - Individualized Education Program)*

*(cf. 6164.6 - Identification and Education Under Section 504)*

2. Science assessments at grades 5, 8, and 10

**However, students with disabilities who are unable to participate in the science assessments, even with the resources described in the "Testing Variations" section below, shall be provided an alternate test when designated in their IEP, as provided in item #3 below.**

*(cf. 6142.93 - Science Instruction)*

3. For students with disabilities who are unable to take the tests specified in items #1-2 above, even with appropriate accommodations or other testing resources, **and who have an IEP that designates the use of alternate tests at the applicable grade levels:**
- California Alternate Assessment in English language arts and mathematics **for students with significant cognitive disabilities**
  - For the science assessment, either the **California Alternate Performance Assessment or California Modified Assessment or, for students with significant cognitive disabilities, the California Alternate Performance Assessment in accordance with their IEP**

In addition, the Superintendent or designee may administer a primary language assessment to English learners **in grades 2-11**. Administration of this test shall not replace the administration of the above tests, administered in English, to English learners. (Education Code 60640)

The primary language assessment also may be used to assess students in a dual language immersion program who are not limited English proficient or who are redesignated fluent English proficient, subject to **the** approval **of by** the California Department of Education (CDE) of an agreement between the district and the state testing contractor. (Education Code 60640)

**Exemptions.**

Each year the Superintendent or designee shall notify parents/guardians of their child's participation in the CAASPP and of the provisions of Education Code 60615 related to exemptions from testing. (5 CCR 852)

*(cf. 5145.6 - Parental Notifications)*

AR 6162.51(d)

### STATE ACADEMIC ACHIEVEMENT TESTS (continued)

A parent/guardian may annually submit to the school a written request to excuse his/her child from any or all parts of the CAASPP assessments for the school year, and such a request shall be granted by the Superintendent or designee. However, district employees shall not solicit or encourage any exemption request on behalf of any student or group of students. (Education Code 60615; 5 CCR 852)

If a parent/guardian submits an exemption request after testing has begun, any test(s) completed before the request is submitted will be scored and the results reported to the parent/guardian and included in the student's records. (5 CCR 852)

#### Testing Period

The Superintendent or designee shall establish testing days for district students within the following **available** testing windows: (5 CCR 855)

1. Assessments in English language arts and mathematics shall **not** be administered **until between the date on which** at least 66 percent of the school's **or track's** annual instructional days **have been completed** for grades 3-8, or at least 80 percent of the annual instructional days for grade 11, **have been completed and may continue up to and including and** the last day of instruction for the regular **annual** calendar **of the school or track**.
2. ~~Alternate assessments for students with disabilities and~~ **All** science assessments, ~~for all students~~ **including CAPA and CMA**, shall be administered during **an available** testing window of 25 instructional days that includes 12 instructional days before and after completion of 85 percent of the school's **or track's, or program's annual** instructional days.
3. **Beginning in the 2016-17 school year, the CAA shall be administered during the available testing windows specified in item #1.**
- 3 4. The primary language assessment shall be administered to English learners within the testing window specified in item #2.

**Within the above testing windows, the Superintendent or designee may designate one testing period for each school or track or, if a school has multiple tracks, a selected testing period for each track. The district shall not exceed six selected testing periods within the available testing window. The testing period shall be no fewer than 25 consecutive instructional days and may be extended up to an additional 10 consecutive instructional days if still within the available testing window set forth in items #1-4 above. (5 CCR 855)**

Students who are absent during testing shall be provided an opportunity to take the tests within the testing window.

AR 6162.51(e)

## STATE ACADEMIC ACHIEVEMENT TESTS (continued)

### Testing Variations

**Assessments CAASSP achievement tests and the primary language test shall be administered in accordance with the manuals or other instructions provided by the test contractor and or CDE except that, as appropriate, students may be provided universal tools, designated supports, and/or accommodations during testing that are specifically allowed pursuant to 5 CCR 853.5 or 853.7. the following testing variations may be used: (5 CCR 850, 853.5, 853.7 853-853.8)**

- 1. Universal tools specified in 5 CCR 853.5 may be used with any student.**
- 2. Designated supports specified in 5 CCR 853.5 and, if an English learner, in 5 CCR 853.7, may be used with a student for whom the need has been indicated by an educator or team of educators, with parent/guardian and student input as appropriate, or for whom the need is specified in the student's IEP or Section 504 plan.**
- 3. Accommodations specified in 5 CCR 853.5 may be used with a student with disabilities when included in the student's IEP or Section 504 plan as resources that are regularly used in the classroom for the student's instruction and/or assessment(s). Such accommodations shall be either utilized in the assessment environment or consist of changes in procedures or materials that increase equitable access during the assessment.**
- 4. If a resource has not been specifically identified in 5 CCR 853.5 or 853.7 but is regularly used by a student in the classroom for instruction and/or assessment, the district or school site test coordinator may submit a written request to the CDE for approval to use that individualized aid. He/she shall submit the request at least 10 business days prior to the student's first day of CAASPP testing. (5 CCR 853.5) An unlisted resource that has not been specifically identified as an approved universal tool, designated support, or accommodation may be used with a student who has an IEP or Section 504 plan provided that the resource is one that is regularly used in the classroom for instruction and/or assessment and the CDE has approved its use. At least 10 business days prior to the student's first day of CAASPP testing, the district or school site test coordinator may electronically submit a request to the CDE for approval to use that unlisted resource during that year. If the CDE determines that the unlisted resource changes the construct being measured, the unlisted resource may nevertheless be used with the student in order to generate an individual score report even though the student shall not be counted in the participation rate for accountability measures. (5 CCR 853.8)**

**In the administration of the CAA to a student with significant cognitive disabilities, the student may have all instructional supports that may be used in daily instruction or assessment, including language and physical supports, with the exception of any inappropriate test practices listed in test administration manuals. (5 CCR 850, 853.6)**

AR 6162.51(f)

**STATE ACADEMIC ACHIEVEMENT TESTS (continued)**

~~Designated supports or accommodations provided to students with disabilities shall be those specified in their IEP or Section 504 plan. (5 CCR 850, 853.5)~~

**Report of Test Results**

For any state assessments that produce valid individual student results, the Superintendent or designee shall forward or transmit the student's test results to his/her parents/guardians within 20 working days from receipt of the results from the test contractor or, if the district receives the results from the contractor after the last day of instruction for the school year, then within the first 20 working days of the next school year. The report shall include a clear explanation of the purpose of the test, the student's score, and its intended use by the district. An individual student's scores shall also be reported to his/her school and teacher(s) and shall be included in his/her student record. (Education Code 60641; 5 CCR 863)

*(cf. 5125 - Student Records)*

With parent/guardian consent, the Superintendent or designee may release a student's test results to a postsecondary educational institution for the purposes of credit, placement, determination of readiness for college-level coursework, or admission. (Education Code 60641)

The Superintendent or designee shall present districtwide, school-level, and grade-level results to the Governing Board at a regularly scheduled meeting. The Board shall not receive individual students' scores or the relative position of any individual student. (Education Code 49076, 60641)

# CSBA Sample Board Policy

**Instruction** BP 6164.2(a)

## **GUIDANCE/COUNSELING SERVICES**

The Governing Board recognizes that a **structured, coherent and** comprehensive counseling program promotes academic achievement and serves the diverse needs of all district students. Counseling staff shall **be available to provide students with individualized reviews of meet with students regarding** their educational progress toward academic and/or career **and vocational** goals and, as appropriate, may discuss social, personal, or other issues that may impact student learning.

The Superintendent or designee shall ensure that all persons employed to provide school counseling, school psychology, and/or school social work services shall possess the appropriate credential from the Commission on Teacher Credentialing authorizing their employment in such positions. Responsibilities of each position shall be clearly defined in a job description.

*(cf. 4112.2 - Certification)*

### **Responsibilities of school counselors include, but are not limited to:**

- 1. Engaging with, advocating for, and providing support for all students with respect to learning and achievement**
- 2. Planning, implementing, and evaluating programs to promote the academic, career, personal, and social development of all students, including students from low-income families, foster youth, homeless youth, undocumented youth, and students at all levels of academic, social, and emotional abilities**
- 3. Using multiple sources of information to monitor and improve student behavior and achievement**
- 4. Collaborating and coordinating with school and community resources**
- 5. Promoting and maintaining a safe learning environment for all students by providing restorative justice practices, positive behavior interventions, and support services**

*(cf. 5131 - Conduct)*

*(cf. 5131.2 - Bullying)*

*(cf. 5138 - Conflict Resolution/Peer Mediation)*

*(cf. 5144 - Discipline)*

- 6. Intervening to ameliorate school-related problems, including issues related to chronic absences**

BP 6164.2(b)

**GUIDANCE/COUNSELING SERVICES (continued)**

*(cf. 5113.1 - Chronic Absence and Truancy)*

**7. Using research-based strategies to reduce stigma, conflict, and student-to-student mistreatment and bullying**

**8. Improving school climate and student well-being**

*(cf. 5137 - Positive School Climate)*

**9. Enhancing students' social and emotional competence, character, health, civic engagement, cultural legacy, and commitment to lifelong learning and the pursuit of high-quality educational programs**

*(cf. 6142.4 - Service Learning/Community Service Classes)*

**10. Providing counseling interventions and support services for students classified as English learners, eligible for free or reduced-priced meals, or foster youth, including enhancing equity and access to the education system and community services**

*(cf. 0460 - Local Control and Accountability Plan)*

*(cf. 6173 - Education for Homeless Children)*

*(cf. 6173.1 - Education for Foster Youth)*

*(cf. 6174 - Education for English Language Learners)*

**11. Engaging in continued development as a professional school counselor**

*(cf. 4131 - Staff Development)*

**Personal or Mental Health Counseling**

A school counselor, school psychologist, or school social worker may provide individualized personal, mental health, or family counseling to students in accordance with the specialization(s) authorized by his/her credential. Such services may include, but are not limited to, support related to the student's social and emotional development, behavior, substance abuse, mental health assessment, depression, or mental illness. As appropriate, students and their parents/guardians shall be informed about community agencies, organizations, or health care providers that offer qualified professional assistance.

*(cf. 1020 - Youth Services)*

*(cf. 5113 - Absences and Excuses)*

*(cf. 5131.6 - Alcohol and Other Drugs)*

*(cf. 5141.4 - Child Abuse Prevention and Reporting)*

*(cf. 5141.6 - School Health Services)*

*(cf. 5145.9 - Hate-Motivated Behavior)*

*(cf. 5147 - Dropout Prevention)*



BP 6164.2(c)

### **GUIDANCE/COUNSELING SERVICES (continued)**

*(cf. 6164.5 - Student Success Teams)*

Written parent/guardian consent shall be obtained before mental health counseling or treatment services are provided to a student, except when the student is authorized to consent to the service pursuant to Family Code 6920-6929, Health and Safety Code 124260, or other applicable law.

Any information of a personal nature disclosed to a school counselor by a student age 12 years or older or by his/her parent/guardian is confidential and shall not become part of the student record without the written consent of the person who disclosed the confidential information. The information shall not be revealed, released, discussed, or referred to except under the limited circumstances specified in Education Code 49602. (Education Code 49602)

*(cf. 5022 - Student and Family Privacy Rights)*  
*(cf. 5125 - Student Records)*

A counselor shall consult with the Superintendent or designee and, as appropriate, with the district's legal counsel whenever unsure of how to respond to a student's personal problem or when questions arise regarding the possible release of confidential information regarding a student.

### **Crisis Counseling**

The Board recognizes the need for a prompt and effective response when students are confronted with a traumatic incident. School counselors shall assist in the development of the comprehensive school safety plan, emergency and disaster preparedness plan, and other prevention and intervention practices designed to assist students and parents/guardians before, during, and after a crisis.

*(cf. 0450 - Comprehensive Safety Plan)*  
*(cf. 3516 - Emergencies and Disaster Preparedness Plan)*

In addition, the Superintendent or designee shall identify crisis counseling resources to train district staff in effective threat assessment, appropriate response techniques, and/or methods to directly help students cope with a crisis if it occurs.

Early identification and intervention plans shall be developed to help identify those students who may be at risk for violence so that support may be provided before they engage in violent or disruptive behavior.

*(cf. 5136 - Gangs)*  
*(cf. 5141.52 - Suicide Prevention)*

BP 6164.2(d)

## **GUIDANCE/COUNSELING SERVICES (continued)**

### **Teacher-Based Advisory Program**

The Board recognizes that a supportive, ongoing relationship with a caring adult can provide a student with valuable advice, enhance student-teacher relationships, and build the student's feelings of connectedness with the school. The Board authorizes the development of a teacher-based advisory program in which teachers advise students in such areas as academic planning, character development, conflict resolution, and self-esteem. Any teacher participating in this program shall be under the supervision of a credentialed school counselor as appropriate, receive related information and training, and be subject to this Board policy and law, including requirements pertaining to student confidentiality and nondiscrimination.

*(cf. 4131 - Staff Development)*

#### *Legal Reference:*

##### EDUCATION CODE

221.5 *Prohibited sex discrimination*

44266 *Pupil personnel services credential*

48431 *Establishing and maintaining high school guidance and placement program*

49600-49604 *Educational counseling*

51250-51251 *School age military dependents*

51513 *Personal beliefs*

##### FAMILY CODE

6920-6929 *Consent by minor for treatment or counseling*

##### HEALTH AND SAFETY CODE

124260 *Mental health services; consent by minors age 12 and older*

##### PENAL CODE

11166-11170 *Reporting known or suspected cases of child abuse*

##### WELFARE AND INSTITUTIONS CODE

5850-5883 *Mental Health Services Act*

##### CODE OF REGULATIONS, TITLE 5

4930-4931 *Counseling*

80049-80049.1 *Pupil personnel services credential*

80632-80632.5 *Preparation programs for pupil personnel services*

##### UNITED STATES CODE, TITLE 10

503 *Military recruiter access to directory information*

##### UNITED STATES CODE, TITLE 20

1232g *Family Educational Rights and Privacy Act*

7908 *Armed forces recruiter access to students and student recruiting information*

##### CODE OF FEDERAL REGULATIONS, TITLE 34

99.1-99.67 *Family educational rights and privacy*

#### *Management Resources:*

##### CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS

*California Results-Based School Counseling and Student Support Guidelines, 2007*

##### WEB SITES

*American School Counselor Association: <http://www.schoolcounselor.org>*

*California Association of School Counselors: <http://www.schoolcounselor-ca.org>*

*California Department of Education: <http://www.cde.ca.gov>*

*Commission on Teacher Credentialing: <http://www.ctc.ca.gov>*

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**GUIDANCE/COUNSELING SERVICES (continued)**

*U.S. Department of Education, access to military recruiters:  
<http://www.ed.gov/policy/gen/guid/fpco/hottopics/ht10-09-02.html>*

# CSBA Sample Board Policy

**Instruction** BP 6164.6(a)

## IDENTIFICATION AND EDUCATION UNDER SECTION 504

The Governing Board believes that all children, including children with disabilities, should have **an-the** opportunity to learn in a safe and nurturing environment. The **district Superintendent or designee** shall work to identify children with disabilities who reside within **its the** jurisdiction **of the district** in order to ensure that they receive educational and related services required by law.

The Superintendent or designee shall provide **identified-qualified** students with disabilities with a free appropriate public education **(FAPE)**, as defined under Section 504 of the federal Rehabilitation Act of 1973. Such students shall receive regular or special education and related aids and services designed to meet their individual educational needs as adequately as the needs of **nondisabled** students **without disabilities** are met. (34 CFR 104.33)

*(cf. 0410 - Nondiscrimination in District Programs and Activities)*  
*(cf. 0430 - Comprehensive Local Plan for Special Education)*  
*(cf. 5141.21 - Administering Medication and Monitoring Health Conditions)*  
*(cf. 5141.22 - Infectious Diseases)*  
*(cf. 5141.23 - Asthma Management)*  
*(cf. 5141.24 - Specialized Health Care Services)*  
*(cf. 5141.27 - Food Allergies/Special Dietary Needs)*  
*(cf. 5144.2 - Suspension and Expulsion/Due Process (Students with Disabilities))*  
*(cf. 6164.4 - Identification and Evaluation of Individuals for Special Education)*

In addition, qualified students with disabilities shall be provided an equal opportunity to participate in programs and activities that are integral components of the district's basic education program, including, but not limited to, extracurricular athletics, interscholastic sports, and/or other nonacademic activities. (34 CFR 104.37)

*(cf. 6145 - Extracurricular and Cocurricular Activities)*  
*(cf. 6145.2 - Athletic Competition)*  
*(cf. 6145.5 - Student Organizations and Equal Access)*

**The district's local control and accountability plan shall include goals and specific actions to improve student achievement and other outcomes of students with disabilities. At least annually, the Superintendent or designee shall assess the district's progress in attaining the goals established for students with disabilities and shall report these results to the Board. (Education Code 52052, 52060)**

***(cf. 0460 - Local Control and Accountability Plan)***

In providing services to students with disabilities under Section 504, the Superintendent or designee shall ensure district compliance with law, including providing the students and their

BP 6164.6(b)

### **IDENTIFICATION AND EDUCATION UNDER SECTION 504 (continued)**

parents/guardians with applicable procedural safeguards and required notifications. Any dispute as to the identification, evaluation, or placement of any student with a disability shall be resolved in accordance with the processes specified in the "Procedural Safeguards" section of the accompanying administrative regulation.

The Superintendent or designee shall maintain a list of impartial hearing officers who are qualified and willing to conduct Section 504 hearings. To ensure impartiality, such officers shall not be employed by or under contract with the district in any other capacity except as hearing officer and shall not have any professional or personal involvement that would affect their impartiality or objectivity in the matter.

*Legal Reference:*

EDUCATION CODE

49423.5 *Specialized physical health care services*

**52052 Numerically significant student subgroups**

**52060-52077 Local control and accountability plan**

**56043 Special education, timelines**

**56321 Assessment; development of IEP; parental notifications, consent**

CODE OF REGULATIONS, TITLE 5

3051.12 *Health and Nursing Services*

UNITED STATES CODE, TITLE 20

1232g *Family Educational Rights and Privacy Act of 1974*

1400-1482 *Individuals with Disabilities Education Act*

UNITED STATES CODE, TITLE 29

705 *Definitions; Vocational Rehabilitation Act*

794 *Rehabilitation Act of 1973, Section 504*

UNITED STATES CODE, TITLE 42

12101-12213 *Americans with Disabilities Act*

**CODE OF REGULATIONS, TITLE 28**

**35.101-35.190 Nondiscrimination on the basis of disability in state and local government services**

CODE OF FEDERAL REGULATIONS, TITLE 34

104.1-104.61 *Nondiscrimination on the basis of handicap, especially:*

104.1 *Purpose to effectuate Section 504 of the Rehabilitation Act of 1973*

104.3 *Definitions*

104.32 *Location and notification*

104.33 *Free appropriate public education*

104.34 *Educational setting*

104.35 *Evaluation and placement*

104.36 *Procedural safeguards*

**104.37 Nonacademic services**

**104.7 Responsible employee; grievance procedures**

COURT DECISIONS

*Christopher S. v. Stanislaus County Office of Education, (2004) 384 F.3d 1205*

*Management Resources:*

CSBA PUBLICATIONS

*Rights of Students with Diabetes Under IDEA and Section 504, Policy Brief, ~~November~~ December 2007*

CALIFORNIA DEPARTMENT OF EDUCATION LEGAL ADVISORIES

*Legal Advisory on Rights of Students with Diabetes in California's K-12 Public Schools, August 2007*

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**IDENTIFICATION AND EDUCATION UNDER SECTION 504 (continued)**

U.S. DEPARTMENT OF EDUCATION OFFICE FOR CIVIL RIGHTS PUBLICATIONS

Dear Colleague Letter and Resource Guide on Students with ADHD, July 2016

Protecting Students with Disabilities: Frequently Asked Questions About Section 504 and the Education of Children with Disabilities, October 2015

Dear Colleague Letter, January 2013

Dear Colleague Letter and Questions and Answers on ADA Amendments Act of 2008 for Students with Disabilities Attending Public Elementary and Secondary Schools, January 2012

Free Appropriate Public Education for Students with Disabilities: Requirements under Section 504 of the Rehabilitation Act of 1973, September 2007

Management Resources continued: (see next page)

BP 6164.6(d)

Management Resources: (continued)

WEB SITES

CSBA: <http://www.csba.org>

California Department of Education: <http://www.cde.ca.gov>

U.S. Department of Education, Office for Civil Rights: <http://www2.ed.gov/about/offices/list/ocr>

# CSBA Sample Administrative Regulation

**Instruction** AR 6164.6(a)

## IDENTIFICATION AND EDUCATION UNDER SECTION 504

The Superintendent designates the following position as the district's 504 Coordinator to implement the requirements of Section 504 of the federal Rehabilitation Act of 1973: (34 CFR 104.7)

Director, Student Support Services  
1500 N Avenue, National City, CA 91950  
619-336-7740

### Definitions

For the purpose of implementing Section 504 ~~of the Rehabilitation Act of 1973~~, the following terms and phrases shall have only the meanings specified below:

*Free appropriate public education* (FAPE) means the provision of regular or special education and related aids and services designed to meet the individual educational needs of a student with disabilities as adequately as the needs of ~~nondisabled~~ students **without disabilities** are met, ~~without~~ **at no** cost to the student or his/her parent/guardian except when a fee is ~~imposed on nondisabled students~~ **specifically authorized by law for all students**. (34 CFR 104.33)

(cf. 3260 - Fees and Charges)

*Student with a disability* means a student who has a physical or mental impairment which substantially limits one or more major life activities. (~~28 CFR 35.108 34 CFR 104.3~~)

*Physical impairment* means any physiological disorder or condition, cosmetic disfigurement, or anatomical loss affecting one or more ~~of the following~~ body systems, **such as:** neurological, musculoskeletal, special sense organs, respiratory, (including speech organs), cardiovascular, reproductive, digestive, genito-urinary, **immune**, hemic, **and** lymphatic, skin, and endocrine. (~~28 CFR 35.108 34 CFR 104.3~~)

*Mental impairment* means any mental or psychological disorder, such as ~~mental retardation~~ **intellectual disability**, organic brain syndrome, emotional or mental illness, and specific learning disabilities. (~~28 CFR 35.108 34 CFR 104.3~~)

*Substantially limits major life activities* means limiting a person's ability to perform functions, **as compared to most people in the general population**, such as caring for himself/herself, performing manual tasks, seeing, hearing, eating, sleeping, walking, standing, lifting, bending, speaking, breathing, learning, reading, concentrating, thinking, **writing**, communicating, and

AR 6164.6(b)

### IDENTIFICATION AND EDUCATION UNDER SECTION 504 (continued)

working. *Major life activities* also includes major bodily functions such as functions of the immune system, **special sense organs and skin**, normal cell growth, ~~and~~ digestive, bowel, bladder, neurological, brain, respiratory, circulatory, **cardiovascular**, endocrine, **hemic, lymphatic, musculoskeletal**, and reproductive functions, **as well as the operation of an individual organ within a body system. The determination of whether an impairment** ~~substantially limits a student's major life activities~~ shall be ~~determined~~ **made** without regard to the ameliorative effects of mitigating measures other than ordinary eyeglasses or contact lenses. *Mitigating measures* **are measures that an individual may use to eliminate or reduce the effects of an impairment**, including, but ~~are~~ not limited to, medications, **medical supplies or equipment**, prosthetic devices, assistive devices, **reasonable modifications or auxiliary aids or services**, learned behavioral, or adaptive neurological modifications, **psychotherapy, behavioral therapy, or physical therapy**. ~~which an individual may use to eliminate or reduce the effects of an impairment.~~ (42 USC 12102; **28 CFR 35.108** ~~34 CFR 104.3~~)

### Referral, Identification, and Evaluation

Any action or decision to be taken by the district involving the referral, identification, or evaluation of a student with disabilities shall be in accordance with the following procedures:

1. A parent/guardian, teacher, other school employee, student success team, or community agency may refer a student to the principal or 504 Coordinator for identification as a student with a disability under Section 504.

*(cf. 6164.5 - Student Success Teams)*

2. Upon receipt of any such referral, the principal, 504 Coordinator, or other qualified individual with expertise in the area of the student's suspected disability shall consider the referral and determine whether an evaluation is appropriate. This determination shall be based on a review of the student's school records, including those in academic and nonacademic areas of the school program; consultation with the student's teacher(s), other professionals, and the parent/guardian, as appropriate; and analysis of the student's needs.

If it is determined that an evaluation is unnecessary, the principal or 504 Coordinator shall inform the parents/guardians in writing of this decision and of the procedural safeguards available, as described in the "Procedural Safeguards" section below.

3. ~~If it is determined that~~ the student needs or is believed to need special education or related services under Section 504, the district shall conduct an evaluation of the student prior to his/her initial placement. (34 CFR 104.35)

Prior to conducting an initial evaluation of a student for eligibility under Section 504, the district shall obtain written parent/guardian consent.



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**IDENTIFICATION AND EDUCATION UNDER SECTION 504 (continued)**

The district's evaluation procedures shall ensure that the tests and other evaluation materials: (34 CFR 104.35)

- a. Have been validated and are administered by trained personnel in conformance with the instruction provided by the test publishers
- b. Are tailored to assess specific areas of educational need and are not merely designed to provide a single general intelligence quotient  
AR 6164.6(e)
- c. Reflect the student's aptitude or achievement or whatever else the tests purport to measure rather than his/her impaired sensory, manual, or speaking skills, except where those skills are the factors that the tests purport to measure

**Section 504 Services Plan and Placement**

Services and placement decisions for students with disabilities shall be determined as follows:

1. A multidisciplinary 504 team shall be convened to review the evaluation data in order to make placement decisions.

The 504 team shall consist of a group of persons knowledgeable about the student, the meaning of the evaluation data, and the placement options. (34 CFR 104.35)

In interpreting evaluation data and making placement decisions, the team shall draw upon information from a variety of sources, including aptitude and achievement tests, teacher recommendations, physical condition, social or cultural background, and adaptive behavior. The team shall also ensure that information obtained from all such sources is documented and carefully considered and that the placement decision is made in conformity with 34 CFR 104.34. (34 CFR 104.35)

2. If, upon evaluation, a student is determined to be eligible for services under Section 504, the team shall meet to develop a written 504 services plan which shall specify the types of regular or special education services, accommodations, and supplementary aids and services necessary to ensure that the student receives FAPE.

The parents/guardians shall be invited to participate in the meeting and shall be given an opportunity to examine all relevant records.

*(cf. 5141.21 - Administering Medication and Monitoring Health Conditions)*

*(cf. 5141.22 - Infectious Diseases)*

*(cf. 5141.23 - Asthma Management)*

*(cf. 5141.24 - Specialized Health Care Services)*

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**IDENTIFICATION AND EDUCATION UNDER SECTION 504 (continued)**

*(cf. 5141.26 - Tuberculosis Testing)*

*(cf. 5141.27 - Food Allergies/Special Dietary Needs)*

3. If the 504 team determines that no services are necessary for the student, the record of the team's meeting shall reflect whether or not the student has been identified as a ~~disabled~~ person **with a disability** under Section 504 and shall state the basis for the determination that no special services are presently needed. The student's parent/guardian shall be informed in writing of his/her rights and procedural safeguards, as described in the "Procedural Safeguards" section below.
4. The student shall be placed in the regular educational environment, unless the district can demonstrate that the education of the student in the regular environment with the use of supplementary aids and services cannot be achieved satisfactorily. The student shall be educated with those who are not disabled to the maximum extent appropriate to his/her individual needs. (34 CFR 104.34)
5. The district shall complete the identification, evaluation, and placement process within a reasonable time frame. **The district shall adhere to this time frame regardless of any extended school breaks or times that school is otherwise not in session.**
6. A copy of the student's Section 504 services plan shall be kept in his/her student record. The student's teacher(s) and any other staff who provide services to the student shall be informed of the plan's requirements.

If a student transfers to another school within the district, the principal or designee at the school from which the student is transferring shall ensure that the principal or designee at the new school receives a copy of the plan prior to the student's enrollment in the new school.

***(cf. 5116.1 - Intradistrict Open Enrollment)***

*(cf. 5125 - Student Records)*

**Review and Reevaluation**

The 504 team shall monitor the progress of the student and, at least annually, shall review the effectiveness of the student's Section 504 services plan to determine whether the services are appropriate and necessary and whether the student's needs are being met as adequately as the needs of ~~nondisabled~~ students **without disabilities are met**. In addition, each student with a disability under Section 504 shall be reevaluated at least once every three years.

A reevaluation of the student's needs shall be conducted before any subsequent significant change in placement. (34 CFR 104.35)

*(cf. 5144.1 - Suspension and Expulsion/Due Process)*

*(cf. 5144.2 - Suspension and Expulsion/Due Process (Students with Disabilities))*

AR 6164.6(e)

## **IDENTIFICATION AND EDUCATION UNDER SECTION 504 (continued)**

### **Procedural Safeguards**

The Superintendent or designee shall notify the parents/guardians of students with disabilities of all actions and decisions by the district regarding the identification, evaluation, or educational placement of their children. He/she also shall notify the parents/guardians of all the procedural safeguards available to them if they disagree with the district's action or decision, including an opportunity to examine all relevant records and an impartial hearing in which they shall have the right to participate. (34 CFR 104.36)

*(cf. 6159.1 - Procedural Safeguards and Complaints for Special Education)*

If a parent/guardian disagrees with any district action or decision regarding the identification, evaluation, or educational placement of his/her child under Section 504, he/she may request a Section 504 due process hearing within 30 days of that action or decision.

Prior to requesting a Section 504 due process hearing, the parent/guardian may, at his/her discretion, but within 30 days of the district's action or decision, request an administrative review of the action or decision. The Coordinator shall designate an appropriate administrator to meet with the parent/guardian to attempt to resolve the issue and the administrative review shall be held within 14 days of receiving the parent/guardian's request. If the parent/guardian is not satisfied with the resolution of the issue, **or if the parent/guardian did not request an administrative review,** he/she may request a Section 504 due process hearing.

**A** Section 504 due process hearing shall be conducted in accordance with the following procedures:

1. The parent/guardian shall submit a written request to the Coordinator within 30 days of receiving the district's decision or, if an administrative review is held, within 14 days of the completion of the review. The request for the due process hearing shall include:
  - a. The specific nature of the decision with which he/she disagrees
  - b. The specific relief he/she seeks
  - c. Any other information he/she believes is pertinent to resolving the disagreement
2. Within 30 days of receiving the parent/guardian's request, the Superintendent or designee and 504 Coordinator shall select an impartial hearing officer. This 30-day deadline may be extended for good cause or by mutual agreement of the parties.

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**IDENTIFICATION AND EDUCATION UNDER SECTION 504 (continued)**

3. Within 45 days of the selection of the hearing officer, the Section 504 due process hearing shall be conducted and a written decision mailed to all parties. This 45-day deadline may be extended for good cause or by mutual agreement of the parties.
4. The parties to the hearing shall be afforded the right to:
  - a. Be accompanied and advised by **legal** counsel and by individuals with special knowledge or training related to the problems of students with disabilities under Section 504
  - b. Present written and oral evidence  
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  - c. Question and cross-examine witnesses
  - d. Receive written findings by the hearing officer stating the decision and explaining the reasons for the decision

If desired, either party may seek a review of the hearing officer's decision by a federal court of competent jurisdiction.

**Notifications**

The Superintendent or designee shall ensure that the district has taken appropriate steps to notify students and parents/guardians of the district's duty under Section 504. (34 CFR 104.32)

*(cf. 5145.6 - Parental Notifications)*

# CSBA Sample Board Policy

**Instruction** BP 6170.1(a)

## TRANSITIONAL KINDERGARTEN

The Governing Board desires to offer a high-quality transitional kindergarten (TK) program for eligible children who do not yet meet the minimum age criterion for kindergarten. The TK program shall assist **TK children students** in developing the academic, social, and emotional skills they need to succeed in kindergarten and beyond.

The district's TK program shall be the first year of a two-year kindergarten program. (Education Code 48000)

The Board encourages ongoing collaboration among district preschool staff, other preschool providers, elementary teachers, administrators, and parents/guardians in ~~program—the~~ development, implementation, and evaluation **of the district's TK program**.

*(cf. 1220 - Citizen Advisory Committees)*

*(cf. 6020 - Parent Involvement)*

## Eligibility

The district's TK program shall admit children whose fifth birthday is from September 2 through December 2. (Education Code 48000)

Parents/guardians of eligible children shall be notified of the availability of the TK program and the age, residency, immunization, and any other enrollment requirements. Enrollment in the TK program shall be voluntary.

*(cf. 5111 - Admission)*

*(cf. 5111.1 - District Residency)*

*(cf. 5141.22 - Infectious Diseases)*

*(cf. 5141.3 - Health Examinations)*

*(cf. 5141.31 - Immunizations)*

*(cf. 5141.32 - Health Screening for School Entry)*

Upon request of a child's parents/guardians, the district may, on a case-by-case basis after the Superintendent or designee determines that it is in the child's best interest, admit into the district's TK program a child whose fifth birthday is on or before September 1 and who is therefore eligible for kindergarten.

**The district may, aA**t any time during the school year, **the district may** admit into the TK program a child whose fifth birthday is after December 2 of that same school year, provided that the

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### **TRANSITIONAL KINDERGARTEN (continued)**

Superintendent or designee recommends that enrollment in a TK program is in the child's best interest **and the child's parents/guardians approve**. Prior to such enrollment, the child's parents/guardians shall be provided information regarding the advantages and disadvantages and any other explanatory information about the effect of early admittance. (Education Code 48000)

#### **Curriculum and Instruction**

The district's TK program shall be based on a modified kindergarten curriculum that is age and developmentally appropriate. (Education Code 48000)

*(cf. 6141 - Curriculum Development and Evaluation)*  
*(cf. 6161.1 - Selection and Evaluation of Instructional Materials)*

The program shall be aligned with the preschool learning foundations and preschool curriculum frameworks developed by the California Department of Education. It shall be designed to facilitate students' development in essential skills related to language and literacy, mathematics, physical development, health, visual and performing arts, science, history-social science, English language development, and social-emotional development.

*(cf. 5148.3 - Preschool/Early Childhood Education)*  
*(cf. 6011 - Academic Standards)*  
*(cf. 6174 - Education for English Learners)*

The Board shall ~~fix~~ **establish** the length(s) of the school day in the district's TK program, **which TK programs may be maintained for different lengths of time either at the same or different school sites, as long as the school day is** ~~shall be~~ at least three hours but no more than four hours. **The Superintendent or designee shall annually report to the California Department of Education as to whether the district's TK programs are offered full day, part day, or both. (Education Code 37202, 46111, 46117, 48003)**

*(cf. 6111 - School Calendar)*  
*(cf. 6112 - School Day)*

TK students may be placed in the same classrooms as kindergarten students when necessary, provided that the instructional program is differentiated to meet student needs.

#### **Staffing**

The Superintendent or designee shall ensure that teachers assigned to teach in TK classes possess a teaching credential or permit from the Commission on Teacher Credentialing (CTC) that authorizes such instruction.

*(cf. 4112.2 - Certification)*

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### **TRANSITIONAL KINDERGARTEN (continued)**

A credentialed teacher who is first assigned to a TK class after July 1, 2015, shall, by August 1, 2020, have at least 24 units in early childhood education and/or child development, comparable experience in a preschool setting, and/or a child development teacher permit issued by the CTC. (Education Code 48000)

The Superintendent or designee may provide professional development as needed to ensure that TK teachers are knowledgeable about the standards and effective instructional methods for teaching young children.

*(cf. 4131 - Staff Development)*

### **Continuation to Kindergarten**

Students who complete the TK program shall be eligible to continue in kindergarten the following school year. Parents/guardians of such students shall not be required to submit a signed Kindergarten Continuance Form for kindergarten attendance.

However, whenever children who would otherwise be age-eligible for kindergarten are enrolled in TK, the Superintendent or designee shall obtain a Kindergarten Continuance Form signed by the parent/guardian near the end of the TK year consenting to the child's enrollment in kindergarten the following year.

A student shall not attend more than two years in a combination of TK and kindergarten. (Education Code 46300)

*(cf. 5123 - Promotion/Acceleration/Retention)*

### **Assessment**

The Superintendent or designee may develop or identify appropriate formal and/or informal assessments of TK students' development and progress. He/she shall monitor and regularly report to the Board regarding program implementation and the progress of students in meeting related academic standards.

*(cf. 0500 - Accountability)*

*(cf. 6162.5 - Student Assessment)*

*Legal Reference: (see next page)*

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**TRANSITIONAL KINDERGARTEN (continued)**

*Legal Reference:*

EDUCATION CODE

8973 *Extended-day kindergarten*  
 37202 *School calendar; equivalency of instructional minutes*  
 44258.9 *Assignment monitoring by county superintendent of schools*  
 46111 *Kindergarten, hours of attendance*  
 46114-46119 *Minimum school day, kindergarten*  
 46300 *Computation of ADA, inclusion of kindergarten and transitional kindergarten*  
 48000 *Age of admission, kindergarten and transitional kindergarten*  
 48002 *Evidence of minimum age required to enter kindergarten or first grade*  
**48003 *Kindergarten annual report***  
 48200 *Compulsory education, starting at age six*

*Management Resources:*

**CSBA PUBLICATIONS**

**What Boards of Education Can Do About Kindergarten Readiness, Governance Brief, May 2016**

CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS

Transitional Kindergarten FAQs

Desired Results Developmental Profile, 2015

Transitional Kindergarten Implementation Guide: A Resource for California Public School District Administrators and Teachers, 2013

California Preschool Curriculum Framework, Vol. 1, 2010

California Preschool Learning Foundations, Vol. 1, 2008

WEB SITES

CSBA: <http://www.csba.org>

California Department of Education: <http://www.cde.ca.gov>

California Kindergarten Association: <http://www.ckanet.org>

Commission on Teacher Credentialing: <http://www.ctc.ca.gov>

Transitional Kindergarten California: <http://www.tkcalifornia.org>



**Minor Revision - AR 6171 - Title I Programs**

In section "Schoolwide Programs," delete item #3 to reflect repeal of 20 USC 6319 pursuant to the Every Student Succeeds Act (P.L. 114-95), and renumber remaining items:

~~3. — Instruction by highly qualified teachers~~

~~(cf. 4112.24 — Teacher Qualifications Under the No Child Left Behind Act)~~

# CSBA Sample Board Policy

**Instruction** BP 6173(a)

## **EDUCATION FOR HOMELESS CHILDREN**

The Governing Board desires to ensure that homeless students have access to the same free and appropriate public education provided to other students within the district. The district shall provide homeless students with access to education and other services necessary for them to meet the same challenging academic standards as other students.

*(cf. 6011 - Academic Standards)*

**The Superintendent or designee shall identify and remove any barriers to the identification and enrollment of homeless students and to the retention of homeless students due to absences or outstanding fees or fines. (42 USC 11432)**

*(cf. 3250 - Transportation Fees)*

*(cf. 3260 - Fees and Charges)*

*(cf. 5113.1 - Chronic Absence and Truancy)*

When there are at least 15 homeless students in the district or a district school, the district's local control and accountability plan (LCAP) shall include goals and specific actions to improve student achievement and other outcomes of homeless students. (Education Code 52052, 52060)

*(cf. 0460 - Local Control and Accountability Plan)*

**The Superintendent or designee shall designate an appropriate staff person to serve as a district liaison for homeless children and youths. The district liaison shall fulfill the duties specified in 42 USC 11432 to assist in identifying and supporting homeless students to succeed in school.**

**In order to identify district students who are homeless, the Superintendent or designee may give a housing questionnaire to all parents/guardians during school registration, make referral forms readily available, include the district liaison's contact information on the district and school web sites, provide materials in a language easily understood by families and students, provide school staff with professional development on the definition and signs of homelessness, and contact appropriate local agencies to coordinate referrals for homeless children and youth and unaccompanied youth.**

*(cf. 1113 - District and School Web Sites)*

*(cf. 4131 - Staff Development)*

*(cf. 4231 - Staff Development)*

*(cf. 4331 - Staff Development)*

BP 6173(b)

### **EDUCATION FOR HOMELESS CHILDREN (continued)**

**Information about a homeless student's living situation shall be considered part of a student's educational record, subject to the Family Educational Rights and Privacy Act and shall not be deemed to be directory information as defined in 20 USC 1232g. (42 USC 11432)**

*(cf. 5125 - Student Records)*

*(cf. 5125.1 - Release of Directory Information)*

The Superintendent or designee shall ensure that placement decisions for homeless students are based on the student's best interest as defined in law and administrative regulation.

**Each homeless student shall be provided services that are comparable to services offered to other students in the school, including, but not limited to, transportation, educational programs for which the student meets the eligibility criteria (such as federal Title I services or similar state or local programs, programs for students with disabilities, and educational programs for English learners), career and technical education programs, programs for gifted and talented students, and school nutrition programs. (42 USC 11432)**

*(cf. 3550 - Food Service/Child Nutrition Program)*

*(cf. 3553 - Free and Reduced Price Meals)*

*(cf. 5148.2 - Before/After School Programs)*

*(cf. 5148.3 - Preschool/Early Childhood Education)*

*(cf. 6159 - Individualized Education Program)*

*(cf. 6164.2 - Guidance/Counseling Services)*

*(cf. 6171 - Title I Programs)*

*(cf. 6172 - Gifted and Talented Student Program)*

*(cf. 6174 - Education for English Language Learners)*

*(cf. 6177 - Summer Learning Programs)*

*(cf. 6178 - Career and Technical Education)*

*(cf. 6179 - Supplemental Instruction)*

Homeless students shall not be segregated into a separate school or program based on their status as homeless and shall not be stigmatized in any way. **However, the Superintendent or designee may separate homeless students on school grounds as necessary for short periods of time for health and safety emergencies or to provide temporary, special, and supplementary services to meet the unique needs of homeless students. (42 USC 11432, 11433)**

*(cf. 0410 - Nondiscrimination in District Programs and Activities)*

*(cf. 3553 - Free and Reduced Price Meals)*

**The Superintendent or designee shall coordinate with other agencies and entities to ensure that homeless children and youth are promptly identified, ensure that homeless students have access to and are in reasonable proximity to available education and related support services, and raise the awareness of school personnel and service providers of the effects of short-term stays in a shelter and other challenges associated with homelessness. Toward**

BP 6173(c)

**EDUCATION FOR HOMELESS CHILDREN (continued)**

these ends, the Superintendent or designee shall collaborate with local social services agencies, other agencies or entities providing services to homeless children and youth, and, if applicable, transitional housing facilities. In addition, the Superintendent or designee shall coordinate transportation, transfer of school records, and other interdistrict activities with other local educational agencies. As necessary, the Superintendent or designee shall coordinate, within the district and with other involved local educational agencies, services for homeless students and services for students with disabilities. (42 USC 11432)

(cf. 1020 - Youth Services)

District liaisons and other appropriate staff shall participate in professional development and other technical assistance activities to assist them in identifying and meeting the needs of homeless students and to provide training on the definitions of terms related to homelessness. (42 USC 11432)

At least annually, the Superintendent or designee shall report to the Board on outcomes for homeless students, which may include, but are not limited to, school attendance, student achievement test results, promotion and retention rates by grade level, graduation rates, suspension/expulsion rates, and other outcomes related to any goals and specific actions identified in the LCAP. Based on the evaluation data, the district shall revise its strategies as needed to better support the education of homeless students.

(cf. 0500 - Accountability)

(cf. 6162.51 - State Academic Achievement Tests)

(cf. 6190 - Evaluation of the Instructional Program)

Legal Reference:

EDUCATION CODE

2558.2 Use of revenue limits to determine average daily attendance of homeless children

39807.5 Payment of transportation costs by parents

48850 Educational rights of homeless and foster youth; participation in extracurricular activities

48852.5 Notice of educational rights of homeless students

48852.7 Enrollment of homeless students

48915.5 Recommended expulsion, homeless student with disabilities

48918.1 Notice of recommended expulsion

51225.1-51225.3 Graduation requirements

52060-52077 Local control and accountability plan

CODE OF REGULATIONS, TITLE 5

4600-4687 Uniform complaint procedures

UNITED STATES CODE, TITLE 20

1087vv Free Application for Federal Student Aid; definitions

1232g Family Educational Rights and Privacy Act

6311 Title I state plan; state and local educational agency report cards

UNITED STATES CODE, TITLE 42

11431-11435 McKinney-Vento Homeless Assistance Act

12705 Cranston-Gonzalez National Affordable Housing Act; state and local strategies

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**EDUCATION FOR HOMELESS CHILDREN (continued)***Management Resources:**CALIFORNIA CHILD WELFARE COUNCIL**Partial Credit Model Policy and Practice Recommendations**CALIFORNIA DEPARTMENT OF EDUCATION**Homeless Education Dispute Resolution Process, January 30, 2007**NATIONAL CENTER FOR HOMELESS EDUCATION PUBLICATIONS**Homeless Liaison Toolkit, 2013**U.S. DEPARTMENT OF EDUCATION GUIDANCE**Dear Colleague Letter, July 27, 2016**Education for Homeless Children and Youths Program, Non-Regulatory Guidance, July 2004 2016**WEB SITES**California Child Welfare Council: <http://www.chhs.ca.gov/Pages/CACildWelfareCouncil.aspx>**California Department of Education, Homeless Children and Youth Education:**<http://www.cde.ca.gov/sp/hs/cy>**National Center for Homeless Education at SERVE: <http://www.serve.org/nche>**National Law Center on Homelessness and Poverty: <http://www.nlchp.org>**U.S. Department of Education: <http://www.ed.gov/programs/homeless/index.html>*

# CSBA Sample

## Administrative Regulation

**Instruction** AR 6173(a)

### EDUCATION FOR HOMELESS CHILDREN

#### Definitions

*Homeless students* means students who lack a fixed, regular, and adequate nighttime residence and includes: (Education Code 48852.7; 42 USC 11434a)

1. Students who are sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason; are living in motels, hotels, trailer parks, or camping grounds due to the lack of alternative adequate accommodations; are living in emergency or transitional shelters; **or** are abandoned in hospitals; ~~or are awaiting foster care placement~~

(cf. 6173.1 - Education for Foster Youth)

2. Students who have a primary nighttime residence that is a public or private place not designed for or ordinarily used as regular sleeping accommodations for human beings
3. Students who are living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations, or similar settings
4. Migratory children who qualify as homeless because they are living in conditions described in items #1-3 above

5. ~~Unaccompanied youth~~ **includes youth** who are not in the physical custody of a parent or guardian. **(20 USC 11434a)**

*School of origin* means the school that the homeless student attended when permanently housed or the school in which he/she was last enrolled, **including a preschool**. If the school the homeless student attended when permanently housed is different from the school in which he/she was last enrolled, or if there is some other school that he/she attended within the preceding 15 months and with which he/she is connected, the district liaison shall determine, in consultation with and with the agreement of the homeless student and the person holding the right to make educational decisions for the student, and in the best interests of the homeless student, which school shall be deemed the school of origin. (Education Code 48852.7; **42 USC 11432**)

*Best interest* means that, in making educational and school placement decisions for a homeless student, consideration is given to, among other factors, educational stability, the opportunity to be educated in the least restrictive educational setting necessary to achieve academic progress, and

AR 6173(b)

**EDUCATION FOR HOMELESS CHILDREN (continued)**

the student's access to academic resources, services, and extracurricular and enrichment activities that are available to all district students. (Education Code 48850, 48853; 42 USC 11432)

**District Liaison**

The Superintendent designates the following staff person as the district liaison for homeless students: (42 USC 11432)

Director, Student Support Services  
5700 N Avenue, National City, CA, 91950  
619-336-7740

The district's liaison for homeless students shall: (Education Code 48852.5; 42 USC 11432)

1. Ensure that homeless students are identified by school personnel **and** through **outreach and ~~coordinated~~ coordination** activities with other entities and agencies

*(cf. 1400 - Relations Between Other Governmental Agencies and the Schools)*

*(cf. 3553 - Free and Reduced-Price Meals)*

*(cf. ~~5141.6 - School Health Services~~)*

2. Ensure that homeless students **are** enrolled **in**, and have a full and equal opportunity to succeed in, district schools
3. Ensure that homeless families and **students—children and youth have access to and** receive educational services for which they are eligible, **including services through Head Start and Early Head Start programs, early intervention services under Part C of the federal Individuals with Disabilities Education Act, and other preschool programs administered by the district**

*(cf. 5148.3 - Preschool/Early Childhood Education)*

4. **Ensure that homeless families and students receive referrals to health care services, dental services, mental health and substance abuse services, housing services, and other appropriate services**

*(cf. 5141.6 - School Health Services)*

4. 5. Inform parents/guardians of the educational and related opportunities available to their children and ensure that they are provided with meaningful opportunities to participate in the education of their children

*(cf. 5145.6 - Parental Notifications)*

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**EDUCATION FOR HOMELESS CHILDREN (continued)**

**5.6.** Disseminate notice of the educational rights of homeless students in **district schools that provide services to homeless children and at places where they receive services, such as locations frequented by parents/guardians of homeless children and youth and by unaccompanied youth, including schools, family shelters, public libraries, and hunger relief agencies (soup kitchens).** The rights shall be presented in a manner and form understandable to the parents/guardians of homeless students and unaccompanied youth.

**6.7.** Mediate enrollment disputes in accordance with law, **Board policy, and administrative regulation and the section "Resolving Enrollment Disputes" below**

**7.8.** Fully inform parents/guardians **of homeless students and unaccompanied youth** of all transportation services, **including transportation to the school of origin, and assist them in accessing transportation to the school of choice**

*(cf. 3250 - Transportation Fees)*

*(cf. 3541 - Transportation Routes and Services)*

**9.** **Ensure that school personnel providing services to homeless students receive professional development and other support**

*(cf. 4131 - Staff Development)*

*(cf. 4231 - Staff Development)*

*(cf. 4331 - Staff Development)*

**10.** **Ensure that unaccompanied youth are enrolled in school, have opportunities to meet the same challenging state academic standards established for other students, and are informed of their status as independent students under 20 USC 1087vv and that they may receive assistance from the district liaison to receive verification of their independent student status for purposes of applying for federal student aid pursuant to 20 USC 1090**

**11.** **Coordinate and collaborate with state coordinators and community and school personnel responsible for the provision of education and related services to homeless students, including the provision of comprehensive data to the state coordinator as required by law**

**8-In addition,** when notified pursuant to Education Code 48918.1, **the district liaison shall** assist, facilitate, or represent a homeless student who is undergoing a disciplinary proceeding that could result in his/her expulsion. **9-** When notified pursuant to Education Code 48915.5, **the district liaison shall** participate in an individualized education program team meeting to make a manifestation determination regarding the behavior of a student with a disability.

*(cf. 5144.1 - Suspension and Expulsion/Due Process)*

*(cf. 5144.2 - Suspension and Expulsion/Due Process (Students with Disabilities))*

*(cf. 6159 - Individualized Education Program)*



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**EDUCATION FOR HOMELESS CHILDREN (continued)**

~~10. Assist a homeless student to obtain records necessary for his/her enrollment into or transfer out of district schools, including immunization, medical, and academic records~~

**The Superintendent or designee shall inform homeless children and youth, their parents/guardians, school personnel, service providers, and advocates working with homeless families of the duties of the district's liaison. He/she shall also provide the name and contact information of the district's liaison to the California Department of Education (CDE) for publishing on the CDE's web site. (42 USC 11432)**

**Enrollment**

The district shall make placement decisions for homeless students based on the student's best interest. (42 USC 11432)

**In determining the best interest of the student, the district shall consider student-centered factors related to the student's best interest, including factors related to the impact of mobility on achievement, education, health, and safety, giving priority to the request of the student's parent/guardian or, in the case of an unaccompanied youth, the youth. (42 USC 11432)**

~~When making a placement decision for a homeless student, the Superintendent or designee may consider~~ **Such factors may include, but are not limited to,** the age of the student, the distance of the commute and the impact it may have on the student's education, personal safety issues, the student's need for special instruction, the length of anticipated stay in the temporary shelter or other temporary location, likely area of future housing, school placement of siblings, and the time remaining in the school year.

However, placement decisions shall not be based on whether a homeless student lives with his/her homeless parent/guardian or has been temporarily placed elsewhere. (42 USC 11432)

In the case of an unaccompanied youth, the liaison shall assist in placement or enrollment decisions, ~~consider~~ **give priority to** the views of the student, and provide notice to the student of his/her appeal rights. (42 USC 11432)

In determining a student's best interest, a homeless student shall, to the extent feasible, be placed in his/her school of origin, unless ~~his/her~~ **the student's** parent/guardian **or the unaccompanied youth** requests otherwise. (Education Code 48852.7; 42 USC 11432)

Once a placement decision has been made, the principal or designee shall immediately enroll the student in the school of choice. The student shall be enrolled even if he/she: (Education Code 48852.7; 42 USC 11432)

AR 6173(e)

**EDUCATION FOR HOMELESS CHILDREN (continued)**

1. Has outstanding fees, fines, textbooks, or other items or monies due to the school last attended

*(cf. 5125.2 - Withholding Grades, Diploma or Transcripts)*

2. Does not have clothing normally required by the school, such as school uniforms

*(cf. 5132 - Dress and Grooming)*

3. Is unable to produce records normally required for enrollment, such as previous academic records, proof of residency, and ~~medical records, including, but not limited to, records or other proof of immunization history~~ **records of immunization and other required health records**

*(cf. 5111 - Admission)*

*(cf. 5111.1 - District Residency)*

*(cf. 5125 - Student Records)*

*(cf. 5141.26 - Tuberculosis Testing)*

*(cf. 5141.31 - Immunizations)*

*(cf. 5141.32 - Health Screening for School Entry)*

**4. Has missed application or enrollment deadlines during any period of homelessness**

The principal or designee shall immediately contact the school last attended by the student to obtain the relevant records. If the student needs to obtain immunizations or does not possess immunization or other **medical required health** records, the principal or designee shall refer the parent/guardian to the district liaison for homeless students. The district liaison shall assist the parent/guardian, or the student if he/she is an unaccompanied youth, in obtaining the necessary immunizations, **screenings**, or records for the student. (42 USC 11432)

If the student is placed at a school other than his/her school of origin or the school requested by his/her parent/guardian **or an unaccompanied youth**, the Superintendent or designee shall provide the parent/guardian **or the unaccompanied youth** with a written explanation of the decision along with a statement regarding the **parent/guardian's** right to appeal the placement decision. (42 USC 11432)

The student may continue attending his/her school of origin for the duration of the homelessness. (Education Code 48852.7; 42 USC 11432)

To ensure that the homeless student has the benefit of matriculating with his/her peers in accordance with the established feeder patterns, the following shall apply: (Education Code 48852.7; **42 USC 11432**)

1. If the student is transitioning between grade levels, he/she shall be allowed to continue in the same attendance area.

AR 6173(f)

### **EDUCATION FOR HOMELESS CHILDREN (continued)**

2. If the student is transitioning to a middle school or high school, and the school designated for matriculation is in another school district, he/she shall be allowed to continue to the school designated for matriculation in that district.

If the student's status changes before the end of the school year so that he/she is no longer homeless, he/she shall be allowed to stay in the school of origin: (Education Code 48852.7)

1. Through the duration of the school year if he/she is in grades K-8
2. Through graduation if he/she is in high school

### **Resolving Enrollment Disputes**

If a dispute arises over **student eligibility, school selection, or enrollment in a particular school, the matter shall be referred to the district liaison, who shall carry out the dispute resolution process as expeditiously as possible. (42 USC 11432)**

The parent/guardian **or unaccompanied youth** shall be provided with a written explanation of ~~the placement decision~~ **any decisions related to eligibility, school selection, or enrollment and of the right of the parent/guardian or unaccompanied youth to appeal such decisions. (42 USC 11432)**

The written explanation shall include:

1. ~~The district liaison's contact information~~
2. ~~A description of the district's placement decision~~
3. ~~Notice of the student's right to enroll in the school of choice pending resolution of the dispute, including the right to fully participate in all school activities~~
4. ~~Notice of the parent/guardian's right to appeal the decision to the county office of education and, if the dispute remains unresolved, to the California Department of Education~~
1. **A description of the action proposed or refused by the district**
2. **An explanation of why the action is proposed or refused**
3. **A description of any other options the district considered and the reasons that any other options were rejected**

AR 6173(g)

**EDUCATION FOR HOMELESS CHILDREN (continued)**

- 4. A description of any other factors relevant to the district's decision and information related to the eligibility or best interest determination including the facts, witnesses, and evidence relied upon and their sources**
- 5. Appropriate timelines to ensure any relevant deadlines are not missed**
- 6. Contact information for the district liaison and state coordinator, and a brief description of their roles**

The written explanation shall be complete, as brief as possible, simply stated, and provided in language that the parent/guardian or student can understand.

**The district liaison may use an informal process as an alternative to formal dispute resolution procedures, provided that the parents/guardians or unaccompanied youth have access to the more formal process if informal resolution is not successful in resolving the matter.**

In working with a student's parents/guardians **or unaccompanied youth** to resolve an enrollment dispute, the district liaison shall:

1. Inform them that they may provide written and/or oral documentation to support their position
2. Inform them that they may seek the assistance of social services, advocates, and/or service providers in having the dispute resolved
3. Provide them a simple form that they may use and turn in to the school to initiate the dispute resolution process
4. Provide them a copy of the dispute form they submit for their records
5. Provide them the outcome of the dispute for their records

If a parent/guardian **or unaccompanied youth** disagrees with the liaison's enrollment decision, he/she may appeal the decision to the Superintendent. The Superintendent shall make a determination within five working days.

If the parent/guardian chooses to appeal the district's placement decision, the district liaison shall forward all written documentation and related paperwork to the homeless liaison at the county office of education.

Pending **final** resolution of the dispute, **including all available appeals**, the student shall be immediately **admitted to enrolled in** the school in which enrollment is sought **pending resolution**

AR 6173(H)

### **EDUCATION FOR HOMELESS CHILDREN (continued)**

**of the dispute, and shall be allowed to attend classes and participate fully in school activities.**  
(42 USC 11432, **11434a**)

#### **Transportation**

The district shall provide transportation for a homeless student to and from his/her school of origin when the student is residing within the district and the parent/guardian, **or the district liaison in the case of an unaccompanied youth**, requests that such transportation be provided. If the student moves outside of district boundaries, but continues to attend his/her school of origin within this district, the Superintendent or designee shall consult with the superintendent of the district in which the student is now residing to agree upon a method to apportion the responsibility and costs of the transportation. (42 USC 11432)

*(cf. 3250 - Transportation Fees)*

*(cf. 3541 - Transportation Routes and Services)*

The district shall not be obligated to provide transportation to students who continue attending their school of origin after they cease to be homeless, unless the formerly homeless student has an individualized education program that includes transportation as a necessary related service for the student. (Education Code 48852.7)

#### **Notification and Complaints**

Information regarding the educational rights of homeless students, as specified in Education Code 51225.1 and 51225.2, shall be included in the annual uniform complaint procedures notification distributed to students, parents/guardians, employees, and other interested parties pursuant to 5 CCR 4622. (Education Code 51225.1, 51225.2)

Any complaint that the district has not complied with requirements regarding the education of homeless students, as specified in Education Code 51225.1 or 51225.2, may be filed in accordance with the district's procedures in AR 1312.3 - Uniform Complaint Procedures.

*(cf. 1312.3 - Uniform Complaint Procedures)*

# CSBA Sample Exhibit

Instruction E(1) 6173(a)

## EDUCATION FOR HOMELESS CHILDREN

### DISTRICT EXPLANATION OF ENROLLMENT DECISION RELATED TO ELIGIBILITY, SCHOOL SELECTION, OR ENROLLMENT

Instructions: The following form is to be used when the district has denied a parent/guardian's the enrollment request provides notice and explanation to a student's parent/guardian or an unaccompanied youth regarding the district's decision related to student eligibility, school selection, or enrollment.

Date: \_\_\_\_\_ Name of person completing form: \_\_\_\_\_  
Title: \_\_\_\_\_ Phone number: \_\_\_\_\_

In accordance with the federal law McKinney-Vento Homeless Assistance Act (42 USC 11432 11431-11435), this notification is being provided to either:

Name of parent(s)/guardian(s): \_\_\_\_\_  
Name of unaccompanied student(s): \_\_\_\_\_

Name of school requested: \_\_\_\_\_  
District's placement decision (name of school): \_\_\_\_\_

Action(s) proposed/refused by the district related to eligibility, school selection, or enrollment:

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After reviewing your request to enroll your child in the school listed above, your enrollment request has been denied.

This The district's determination regarding eligibility, school selection, or enrollment was based upon the following evidence and for the following reasons:

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E(1) 6173(b)

**EDUCATION FOR HOMELESS CHILDREN (continued)**

**Other options that the district considered, if any, included the following options which were rejected for the following reasons:**

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**Factors relevant to the district's decision and information related to the eligibility or best interest determination including the facts, witnesses, and evidence relied upon and their sources, if any:**

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You have the right to appeal this decision to the district Superintendent. **To do so, contact the district's homeless liaison listed below within the next \_\_\_(insert number of days)\_\_\_ days to request a Dispute Form. You may provide written or verbal documentation to support your position, and may also seek the assistance of social services, advocates, and/or service providers in the dispute process. The Superintendent or designee will review all the evidence and will notify you of his/her decision within \_\_\_(insert number of days)\_\_\_ days.**

If you are not satisfied with the Superintendent's decision, you may appeal to the **San Diego** County Office of Education. If you are not satisfied with the county office's decision, you may then appeal to the California Department of Education. The district's homeless liaison can assist you with this appeal.

**CONTACT INFORMATION:**

**District Liaison: The district liaison is one of the primary contacts between homeless families and school or district staff. He/she is responsible for coordinating services to ensure that homeless students enroll in school and have the opportunity to succeed academically, and mediates enrollment disputes as needed.**

Name of district's homeless liaison: Director Student Support Services  
Address: 1500 N Avenue, National City, CA, 91950  
Phone number: 619-336-7740

**County Liaison: If you appeal the district's decision to the county office of education, the district liaison shall forward all written documentation and related paperwork to the**

E(1) 6173(c)

**EDUCATION FOR HOMELESS CHILDREN (continued)**

**homeless liaison at the county office. The county liaison will review the materials and determine the eligibility, school selection, or enrollment decision within five working days of receiving the materials. He/she will notify you of the decision.**

Name of County Office of Education homeless liaison: \_\_\_\_\_

Address: \_\_\_\_\_

Phone number: \_\_\_\_\_

**State Coordinator: If you appeal the county office's decision to the California Department of Education, the county homeless liaison shall forward all written documentation and related paperwork to the State Homeless Coordinator. The state coordinator will review the district, county office, and parent/guardian information and will notify you of the decision within ten working days of receiving the materials.**

**Name of state homeless coordinator:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Phone number:** \_\_\_\_\_

**RIGHTS:**

**You also have the following rights:**

Pending **the final** resolution of this dispute, **including the period of all appeals**, ~~your child~~ **the student** has the right to immediately enroll in the school ~~you~~ requested and to participate **fully** in school activities at that school.

- **You may provide written or verbal documentation to support your position. You may use the district's dispute resolution form. A copy of the dispute resolution form can be obtained from the district's liaison for homeless students.**

- **You may seek the assistance of advocates or attorneys to help you with this appeal.**



# CSBA Sample Exhibit

**Instruction** E(2) 6173

## EDUCATION FOR HOMELESS CHILDREN

### **ENROLLMENT DISPUTE FORM**

Instructions: This form is to be completed by a parent/guardian or student when a dispute regarding enrollment has arisen. As an alternative to completing this form, the information on this form may be shared verbally with the district's liaison for homeless students.

Date submitted: \_\_\_\_\_  
 Name of person completing form: \_\_\_\_\_  
 Student's name: \_\_\_\_\_  
 Name of person completing form: \_\_\_\_\_  
 Relation to student: \_\_\_\_\_  
 I may be contacted at the following:  
 Address: \_\_\_\_\_  
 Phone number: \_\_\_\_\_

Name of school requested: \_\_\_\_\_

I wish to appeal the **eligibility, school selection, or** enrollment decision made by:  
 District liaison     **District** Superintendent     County **office of education** liaison

Reason for the appeal: You may include an explanation to support your appeal in this space or provide your explanation verbally.

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

I have been provided with:

- A written explanation of the district's decision
- Contact information for the district's homeless liaison
- Contact information for the county office of education's homeless liaison
- Contact information for the state homeless coordinator**

# CSBA Sample Administrative Regulation

**Instruction** AR 6173.1(a)

## EDUCATION FOR FOSTER YOUTH

### Definitions

*Foster youth* means a child who has been removed from his/her home pursuant to Welfare and Institutions Code 309, is the subject of a petition filed under Welfare and Institutions Code 300 or 602, or has been removed from his/her home and is the subject of a petition filed under Welfare and Institutions Code 300 or 602 or is a nonminor who is under the transition jurisdiction of a juvenile court, as described in Welfare and Institutions Code 450, and satisfies the criteria specified in Education Code 42238.01. (Education Code 42238.01, 48853.5)

*Person holding the right to make educational decisions* means a responsible adult appointed by a court pursuant to Welfare and Institutions Code 361 or 726.

*School of origin* means the school that the foster youth attended when permanently housed or the school in which he/she was last enrolled. If the school the foster youth attended when permanently housed is different from the school in which he/she was last enrolled, or if there is ~~some other~~ **another** school that the foster youth attended within the preceding 15 months and with which the youth is connected, the district liaison for foster youth shall determine **which school is the school of origin**; **This determination shall be made** in consultation with and with the agreement of the foster youth and the person holding the right to make educational decisions for the youth, and **it shall be based on** the best interests of the foster youth, ~~which school is the school of origin~~. (Education Code 48853.5)

*Best interest* means that, in making educational and school placement decisions for a foster youth, consideration is given to, among other factors, **the proximity to the school at the time of placement, appropriateness of the educational setting**, educational stability, the opportunity to be educated in the least restrictive educational setting necessary to achieve academic progress, and the foster youth's access to academic resources, services, and extracurricular and enrichment activities that are available to all district students. (Education Code 48850, 48853; **20 USC 6311**)

### District Liaison

The Superintendent designates the following position as the district's liaison for foster youth: (Education Code 48853.5)

Director, Student Support Services  
1500 N Avenue, National City, CA, 91950  
(619) 336-7740

AR 6173.1(b)

**EDUCATION FOR FOSTER YOUTH (continued)**

*(cf. 6173 - Education for Homeless Children)*

The liaison for foster youth shall:

1. Ensure and facilitate the proper educational placement, enrollment in school, and checkout from school of students in foster care (Education Code 48853.5)
2. Ensure proper transfer of credits, records, and grades when students in foster care transfer from one school to another or from one district to another (Education Code 48645.5, 48853.5)

When a student in foster care is enrolling in a district school, the liaison shall contact the school last attended by the student to obtain, within two business days, all academic and other records. When a foster youth is transferring to a new school, the liaison shall provide the student's records to the new school within two business days of receiving the new school's request. (Education Code 48853.5)

*(cf. 5125 - Student Records)*

*(cf. 6146.3 - Reciprocity of Academic Credit)*

3. When required by law, notify the foster youth's attorney and the representative of the appropriate county child welfare agency when the foster youth is undergoing any expulsion or other disciplinary proceeding, including a manifestation determination prior to a change in the foster youth's placement, when he/she is a student with a disability. (Education Code 48853.5, 48911, 48915.5, 48918.1)

*(cf. 5144.1 - Suspension and Expulsion/Due Process)*

*(cf. 5144.2 - Suspension and Expulsion/Due Process (Students with Disabilities))*

*(cf. 6159.4 - Behavioral Interventions for Special Education Students)*

4. As needed, make appropriate referrals to ensure that students in foster care receive necessary special education services and services under Section 504 of the federal Rehabilitation Act of 1973

*(cf. 6164.4 - Identification and Evaluation of Individuals for Special Education)*

*(cf. 6164.6 - Identification and Education Under Section 504)*

5. As needed, ensure that students in foster care receive appropriate school-based services, such as counseling and health services, supplemental instruction, and after-school services

*(cf. 5141.6 - School Health Services)*

*(cf. 5148.2 - Before/After School Programs)*

*(cf. 6164.2 - Guidance/Counseling Services)*

*(cf. 6172 - Gifted and Talented Student Program)*

*(cf. 6174 - Education for English Learners)*

*(cf. 6177 - Summer Learning Programs)*

*(cf. 6179 - Supplemental Instruction)*

AR 6173.1(c)

**EDUCATION FOR FOSTER YOUTH (continued)**

6. Develop protocols and procedures for creating awareness for district staff, including principals, school registrars, and attendance clerks, of the requirements for the proper enrollment, placement, and transfer of foster youth

*(cf. 4131 - Staff Development)*

*(cf. 4231 - Staff Development)*

*(cf. 4331 - Staff Development)*

7. Collaborate with the county office of education, county placing agency, county child welfare agency, county probation department, juvenile court, and other appropriate agencies to help coordinate services for the district's foster youth

*(cf. 1020 - Youth Services)*

*(cf. 5113.1 - Chronic Absence and Truancy)*

8. Monitor the educational progress of foster youth and provide reports to the Superintendent or designee and the Governing Board based on indicators identified in the district's local control and accountability plan

*(cf. 0460 - Local Control and Accountability Plan)*

The Superintendent or designee shall regularly monitor the caseload of the liaison, as well as his/her additional duties outside of the foster youth program, to determine whether adequate time and resources are available to meet the needs of foster youth in the district.

**Enrollment**

A student placed in a licensed children's institution or foster family home within the district shall attend programs operated by the district unless one of the following circumstances applies: (Education Code 48853, 48853.5)

1. The student has an individualized education program requiring placement in a nonpublic, nonsectarian school or agency or in another local educational agency.
2. The parent/guardian or other person holding the right to make educational decisions for the student determines that it is in the best interest of the student to be placed in another educational program and submits a written statement to the district indicating that determination and that he/she is aware of the following:
  - a. The student has a right to attend a regular public school in the least restrictive environment.
  - b. The alternate educational program is a special education program, if applicable.

AR 6173.1(d)

**EDUCATION FOR FOSTER YOUTH (continued)**

- c. The decision to unilaterally remove the student from the district school and to place him/her in an alternate education program may not be financed by the district.
- d. Any attempt to seek reimbursement for the alternate education program may be at the expense of the parent/guardian or other person holding the right to make educational decisions for the student.

*(cf. 5116.1 - Intradistrict Open Enrollment)*

*(cf. 5117 - Interdistrict Attendance)*

*(cf. 6159.3 - Appointment of Surrogate Parent for Special Education Students)*

- 3. At the initial placement or any subsequent change in placement, the student exercises his/her right to continue in his/her school of origin, as defined above.
  - a. The student may continue in the school of origin for the duration of the court's jurisdiction.
  - b. If the court's jurisdiction over a grade K-8 student is terminated prior to the end of a school year, the student may continue in his/her school of origin for the remainder of the school year.
  - c. If the court's jurisdiction is terminated while the student is in high school, the student may continue in his/her school of origin until he/she graduates.
  - d. If the student is transitioning between school grade levels, he/she shall be allowed to continue in the district of origin in the same attendance area to provide him/her the benefit of matriculating with his/her peers in accordance with the established feeder patterns of school districts. A student who is transitioning to a middle school or high school shall be allowed to enroll in the school designated for matriculation in another school district.

The district liaison may, in consultation with and with the agreement of the foster youth and the person holding the right to make educational decisions for the youth, recommend that the youth's right to attend the school of origin be waived and he/she be enrolled in any school that students living in the attendance area in which the foster youth resides are eligible to attend. All decisions shall be made in accordance with the foster youth's best interests. (Education Code 48853.5)

Prior to making any recommendation to move a foster youth from his/her school of origin, the liaison shall provide the youth and the person holding the right to make educational decisions for the youth with a written explanation of the basis for the recommendation and how the recommendation serves the youth's best interests. (Education Code 48853.5)

The role of the liaison shall be advisory with respect to placement decisions and determination of the school of origin. (Education Code 48853.5)

AR 6173.1(e)

### **EDUCATION FOR FOSTER YOUTH (continued)**

If the liaison, in consultation with the foster youth and the person holding the right to make educational decisions for the foster youth, agrees that the best interests of the youth would be served by his/her transfer to a school other than the school of origin, the principal or designee of the new school shall immediately enroll the foster youth. The foster youth shall be immediately enrolled even if he/she: (Education Code 48853.5)

1. Has outstanding fees, fines, textbooks, or other items or monies due to the school last attended

*(cf. 5125.2 - Withholding Grades, Diploma or Transcripts)*

2. Does not have clothing normally required by the school, such as school uniforms

*(cf. 5132 - Dress and Grooming)*

3. Is unable to produce records normally required for enrollment, such as previous academic records, proof of residency, and medical records, including, but not limited to, immunization records or other documentation

*(cf. 5111.1 - District Residency)*

*(cf. 5141.26 - Tuberculosis Testing)*

*(cf. 5141.31 - Immunizations)*

*(cf. 5141.32 - Health Screening for School Entry)*

If the foster youth or a person **with holding** the right to make educational decisions for the foster youth disagrees with the liaison's enrollment recommendation, he/she may appeal to the Superintendent. The Superintendent shall make a determination within 30 calendar days of receipt of the appeal. Within 30 calendar days of receipt of the Superintendent's decision, the parent/guardian or foster youth may appeal that decision to the Board. The Board shall consider the issue at its next regularly scheduled meeting. The Board's decision shall be final.

*(cf. 9320 - Meetings and Notices)*

If any dispute arises regarding the request of a foster youth to remain in the school of origin, the youth has the right to remain in the school of origin pending resolution of the dispute. (Education Code 48853.5)

### **Transportation**

**OPTION 1:** ~~The district shall not be responsible for providing transportation to and from the school of origin.~~

**OPTION 2:** ~~Upon request, the district may provide transportation for a foster youth to and from his/her school of origin when the student is residing within the district and the school of origin is within district boundaries.~~

AR 6173.1(f)

### **EDUCATION FOR FOSTER YOUTH (continued)**

**The Superintendent or designee shall collaborate with the local child welfare agency to determine how transportation will be provided, arranged, and funded in a cost-effective manner to enable foster youth to remain in their school of origin, for the duration of their time in foster care, when it is in their best interest to do so. Such transportation costs may be paid by either the child welfare agency or the district, or shared by both. (20 USC 6312)**

*(cf. 3540 - Transportation)*

*(cf. 3541 - Transportation Routes and Services)*

### **Effect of Absences on Grades**

The grades of a student in foster care shall not be lowered for any absence from school that is due to either of the following circumstances: (Education Code 49069.5)

1. A decision by a court or placement agency to change the student's placement, in which case the student's grades shall be calculated as of the date he/she left school
2. A verified court appearance or related court-ordered activity

*(cf. 5121 - Grades/Evaluation of Student Achievement)*

### **Notification and Complaints**

Information regarding the educational rights of foster youth shall be included in the annual uniform complaint procedures notification distributed to students, parents/guardians, employees, and other interested parties pursuant to 5 CCR 4622. (Education Code 48853, 48853.5, 49069.5, 51225.1, 51225.2)

*(cf. 5145.6 - Parental Notifications)*

Any complaint **alleging** that the district has not complied with requirements regarding the education of foster youth may be filed in accordance with the district's procedures in AR 1312.3 - Uniform Complaint Procedures. If the district finds merit in a complaint, the district shall provide a remedy to the affected student. A complainant not satisfied with the district's decision may appeal the decision to the California Department of Education (CDE) and shall receive a written decision regarding the appeal within 60 days of CDE's receipt of the appeal. If the CDE finds merit in an appeal, the district shall provide a remedy to the affected student. (Education Code 48853, 48853.5, 49069.5, 51225.1, 51225.2)

*(cf. 1312.3 - Uniform Complaint Procedures)*

# CSBA Sample Board Policy

**Instruction** BP 6173.2(a)

## EDUCATION OF CHILDREN OF MILITARY FAMILIES

The Governing Board recognizes ~~the challenges to the academic success of that~~ children of military families **face challenges to their academic success** caused by the frequent moves or deployments of their parents/guardians in fulfillment of military service. ~~In accordance with law,~~ **¶**The district shall provide such students with academic resources, services, and opportunities for extracurricular and enrichment activities that are available to all district students.

*(cf. 5125 - Student Records)*  
*(cf. 6011 - Academic Standards)*  
*(cf. 6145 - Extracurricular and Cocurricular Activities)*  
*(cf. 6145.2 - Athletic Competition)*  
*(cf. 6179 - Supplemental Instruction)*

~~In making decisions about children of military families, including decisions regarding their enrollment, placement, eligibility for extracurricular activities, or waiver of any graduation requirement, the Superintendent or designee shall be flexible to the extent permitted by law and district policy.~~ **The Superintendent or designee may waive district policies or rules when necessary to facilitate the enrollment, placement, advancement, eligibility for extracurricular activities, or on-time graduation of children of military families, in accordance with the Interstate Compact on Educational Opportunity for Military Children as ratified in Education Code 49700-49704.**

*(cf. 5117 - Interdistrict Attendance)*  
*(cf. 6146.1 - High School Graduation Requirements)*  
*(cf. 6146.3 - Reciprocity of Academic Credit)*

**The Superintendent or designee shall provide information and/or training to administrators, other appropriate district staff, and military families regarding the provisions of the Interstate Compact and the educational rights of children of military families.**

*(cf. 4131 - Staff Development)*  
*(cf. 4231 - Staff Development)*  
*(cf. 4331 - Staff Development)*  
*(cf. 5020 - Parent Rights and Responsibilities)*

The Superintendent or designee shall ~~work~~ **collaborate** with parents/guardians, ~~and shall collaborate with~~ **school liaison officers from military installations, and/or local, state, and** other agencies within and outside the state to facilitate the transition of children of military families into and out of the district.

*(cf. 1020 - Youth Services)*



BP 6173.2(b)

## EDUCATION OF CHILDREN OF MILITARY FAMILIES (continued)

(cf. 1400 - Relations Between Other Governmental Agencies and the Schools)

(cf. 6020 - Parent Involvement)

The Superintendent or designee shall **regularly annually** report to the Board **and the public** on the educational outcomes of children of military families, **enrolled in district schools, Such reports may include, including,** but **are** not limited to, school attendance, student achievement test results, promotion and retention rates by grade levels, **participation in extracurricular activities,** and graduation rates.

(cf. 5123 - Promotion/Acceleration/Retention)

(cf. 6162.51 - State Academic Achievement Tests)

~~(cf. 6162.52 - High School Exit Examination)~~

Legal Reference:

### EDUCATION CODE

35160.5 District policy rules and regulations; requirements; matters subject to regulation

35179 Interscholastic athletics; associations or consortia

35181 Students' responsibilities

35351 Assignment of students to particular schools

46600-46611 Interdistrict attendance agreements

48050-48054 Nonresidents

48200-48208 Persons included (compulsory education law)

48300-48316 Student attendance alternatives, school district of choice program

49700-49704 Education of children of military families

51225.3 Requirements for graduation

51240-51246 Exemptions from requirements

51250-51251 School-age military dependents

~~60850-60859 High school exit examination~~

66204 Certification of high school courses as meeting university admissions criteria

### UNITED STATES CODE, TITLE 10

#### **101 Definitions**

1209 Transfer to inactive status list instead of separation

1211 Members on temporary disability retired list: return to active duty; promotion

### UNITED STATES CODE, TITLE 20

1400-1482 Individuals with Disabilities Education Act

#### **6311 State plan**

### UNITED STATES CODE, TITLE 29

794 Section 504 **of the federal Rehabilitation Act**

Management Resources:

### **CALIFORNIA CHILD WELFARE COUNCIL**

#### **Partial Credit Model Policy and Practice Recommendations**

#### **CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS TASK FORCE REPORT TO THE LEGISLATURE**

~~Compact on Educational Opportunity for Military Children: Preliminary Final Report, March 2009~~

#### **Final Report to the Legislature on the Interstate Compact on Educational Opportunity for Military Children, April 2014**

### WEB SITES

CSBA: <http://www.csba.org>

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**EDUCATION OF CHILDREN OF MILITARY FAMILIES**

***California Child Welfare Council: <http://www.chhs.ca.gov/Pages/CACildWelfareCouncil.aspx>***

***California Department of Education, Educational Options Office: <http://www.cde.ca.gov/ls/pf/mc>***

***Military Interstate Children's Compact Commission: <http://www.mic3.net>***

# CSBA Sample Administrative Regulation

**Instruction** AR 6173.2(a)

## EDUCATION OF CHILDREN OF MILITARY FAMILIES

### Definitions

*Children of military families* are school-aged children in the household of: (Education Code 49701)

1. Members who are in full-time duty status in the active uniformed service of the United States, including any member of the National Guard and Reserve on active duty order pursuant to 10 USC 1209 or 1211
2. Members or veterans of the uniformed services who are severely injured and medically discharged or retired, for one year after their medical discharge or retirement
3. Members of the uniformed services who have died while on active duty or as a result of injuries sustained on active duty, for one year after their death

### Enrollment

The Superintendent or designee shall facilitate the enrollment of children of military families and ensure that they are not placed at a disadvantage due to difficulty in the transfer of their records from previous school districts and/or variations in entrance or age requirements. (Education Code 49701)

**A child of a military family shall be deemed to meet district residency requirements if his/her parent/guardian, while on active military duty pursuant to an official military order, is transferred or is pending transfer to a military installation within the state. The Superintendent or designee shall accept electronic submission of such a student's application for enrollment, including enrollment in a specific school or program within the district, and for course registration. (Education Code 48204.3)**

*(cf. 5111.1 - District Residency)*

When a child of a military family is transferring into the district, the Superintendent or designee may enroll the child based on the child's placement in the previous district, pending receipt of the child's records. Upon enrollment, the Superintendent or designee shall immediately request the student's records from the student's previous district. The Superintendent or designee shall allow the student 30 days from the date of enrollment to obtain all required immunizations. (Education Code 49701)

AR 6173.2(b)

**EDUCATION OF CHILDREN OF MILITARY FAMILIES (continued)**

*(cf. 5111 - Admission)*

*(cf. 5125 - Student Records)*

*(cf. 5141- Health Care and Emergencies)*

*(cf. 5141.31- Immunizations)*

A child of an active military duty parent/guardian shall not be prohibited from transferring out of the district to any district that has declared itself to be a "school district of choice" pursuant to Education Code 48300-48316, if the other school district of proposed enrollment approves the application for transfer. (Education Code 46600, 48301 48307)

*(cf. 5117 - Interdistrict Attendance)*

When a child of a military family is transferring out of the district, the Superintendent or designee shall provide the student's parents/guardians with a complete set of the student's records or, if the official student record cannot be released, an unofficial or "hand-carried" record. Upon request from the new district, the Superintendent or designee shall provide a copy of the student's record to the new district within 10 days. (Education Code 49701)

**Placement and Attendance**

Whenever a student's parent/guardian is serving on active duty or has been discharged from military service within the last year and the student transfers to a new school as the direct result of the military transfer or discharge, the Superintendent or designee may, prior to the receipt of official transcript(s) or the arrival of the student, review the student's coursework to date, including any unofficial transcript(s), to determine the appropriate placement of the student in classes. The evaluation shall also include communication with school counselors and teachers at the former school by videoconferencing, email, and/or telephone calls. (Education Code 51251)

The Superintendent or designee shall initially honor the placement of any child of a military family in educational courses and programs based on the child's enrollment and/or assessment in his/her previous school. The Superintendent or designee may, to the extent permitted by Board policy, waive course or program prerequisites, preconditions, and/or application deadlines when making decisions regarding placement of children of military families and their eligibility for extracurricular academic, athletic, and social activities. (Education Code 49701)

*(cf. 6141.5 - Advanced Placement)*

*(cf. 6145 - Extracurricular and Cocurricular Activities)*

*(cf. 6145.2 - Athletic Competition)*

*(cf. 6172 - Gifted and Talented Student Program)*

*(cf. 6174 - Education for English Learners).*

When a child of a military family transferring into the district has been identified as an individual with a disability pursuant to 20 USC 1400-1482, the Superintendent or designee shall provide

AR 6173.2(c)

**EDUCATION OF CHILDREN OF MILITARY FAMILIES (continued)**

comparable services to the student based on his/her current individualized education program. In addition, when the child of a military family transferring into the district is eligible for services under Section 504 of the federal Rehabilitation Act, the Superintendent or designee shall make reasonable accommodations and modifications to address the needs of the student subject to the student's existing Section 504 plan. The district may authorize subsequent evaluations of the student to ensure appropriate placement. (Education Code 49701)

*(cf. 6159 - Individualized Education Program)*

*(cf. 6164.4 - Identification and Evaluation of Individuals for Special Education)*

*(cf. 6164.6 - Identification and Education Under Section 504)*

When a student's parent/guardian is an active duty member and is called to duty **for**, is on leave from, or is immediately returned from deployment to a combat zone or to combat support posting, the Superintendent or designee may grant additional excused absences to the student to visit with his/her parent/guardian. (Education Code 49701)

*(cf. 5113 - Absences and Excuses)*

# CSBA Sample Board Policy

**Instruction** BP 6176(a)

## WEEKEND/SATURDAY CLASSES

The Governing Board desires to increase educational opportunities outside the regular school week in order to meet student needs and promote academic achievement. When staffing, facilities, and other resources are available, the Board may approve the provision of classes on Saturday and/or Sunday that support and are integrated with other learning opportunities.

~~(cf. 4113 - Assignment)~~

(cf. 5148.2 - Before/After School Programs)

(cf. 6111 - School Calendar)

Weekend classes may include, but are not limited to:

1. Continuation classes (Education Code 37223)
 

(cf. 6184 - Continuation Education)
2. Special day classes for mentally gifted minors (Education Code 37223)
 

(cf. 6172 - Gifted and Talented Student Program)
3. Makeup classes for ~~unexcused~~ absences occurring during the week (Education Code 37223)
 

(cf. 5113 - Absences and Excuses)  
(cf. 5113.1 - Chronic Absence and Truancy)  
(cf. 6154 - Homework/Makeup Work)
4. The programs of an **regional occupational center or program (ROC/P)** (Education Code 37223)
 

(cf. 6178 - Career Technical Education)  
(cf. 6178.2 - Regional Occupational Center/Program)
5. Supplemental instruction for students who need additional assistance to meet academic standards or requirements
 

(cf. 5123 - Promotion/Acceleration/Retention)  
(cf. 6146.1 - High School Graduation Requirements)  
(cf. 6179 - Supplemental Instruction)
6. Enrichment classes in core academic subjects
 

(cf. 6142.91 - Reading/Language Arts Instruction)

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**WEEKEND/SATURDAY CLASSES (continued)**

*(cf. 6142.92 - Mathematics Instruction)*

**Except in ROC/Ps and as otherwise provided by law, any class offered on a Saturday or Sunday pursuant to Education Code 37223, except in ROC/Ps, shall be one offered during the regular Monday through Friday during the regular school week. (Education Code 37223)**

Except in ROC/Ps, weekend attendance shall not result in crediting any student with more than five days of attendance per week. (Education Code 37223)

Attendance at weekend classes offered pursuant to Education Code 37223 shall be voluntary, except that truants, as defined in Education Code 48260, may be required to attend classes on one day of a weekend in order to make up lost instructional time. (Education Code 37223)

A student shall be excused from a weekend class if **the student's parent/guardian notifies the school in writing that** such attendance would be in conflict with his/her religious beliefs. Such students shall be given priority for enrollment in any other available supplemental instruction offered at a time other than during the weekend.

*(cf. 6141.2 - Recognition of Religious Beliefs and Customs)*

**A teacher shall not be assigned to work on a Saturday or Sunday if he/she objects in writing that the assignment would conflict with his/her religious beliefs or practices. In addition, a full-time teacher employed by the district prior to the implementation of weekend classes shall not be required, without his/her consent, to teach for more than 180 full days during a school year or for more than the number of full days that district schools were maintained during the year preceding implementation of weekend classes, whichever is greater. (Education Code 44824)**

***(cf. 4113 - Assignment)***

Unless the requirement is waived by the California Department of Education, the district shall provide at least one nutritionally adequate meal during the weekend session in accordance with Education Code 49550.

*(cf. 3550 - Food Service/Child Nutrition Program)*

*(cf. 3553 - Free and Reduced-Price Meals)*

*(cf. 5030 - Student Wellness)*

*Legal Reference:*

EDUCATION CODE

37223 Weekend classes

~~37252-37253 Supplemental instruction~~

~~41505-41508 Pupil Retention Block Grant~~

41601 Reports of average daily attendance

44824 Weekend classes, assignment of certificated employees

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**WEEKEND/SATURDAY CLASSES (continued)**

*48070-48070.5 Promotion and retention, supplemental instruction*

*48205 Excused absence for personal reasons*

*48260 Truants, definition*

*49550 Meals for needy students*

*52060-52077 Local control and accountability plan*

*Management Resources:*

*CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS*

*Requesting a Summer School Meal Waiver and/or a Saturday School Meal Waiver, Nutrition Services*

*Division Management Bulletin NSD-SNP-03-2013, February 2013*

*WEB SITES*

*California Department of Education: <http://www.cde.ca.gov>*



# CSBA Sample Board Policy

**Instruction** BP 6185(a)

## COMMUNITY DAY SCHOOL

The Governing Board recognizes the need to provide an appropriate alternative educational **program option** for expelled students who are prohibited from attending regular schools in the district, **and for certain students referred by probation pursuant to Welfare and Institutions Code 300 or 602, and students referred by a school attendance review board or by another district-level referral processes.** The district's ~~shall operate one or more community day schools~~ **program shall be** designed to meet the needs of these students **and ensure academic progress necessary for their success when returned to a regular school environment.** The Superintendent or designee ~~shall ensure that any such school is operated in accordance with legal requirements related to enrollment, instructional time and facilities.~~

*(cf. 5113 - Absences and Excuses)*

*(cf. 5113.1 - Chronic Absence and Truancy)*

*(cf. 5144 - Discipline)*

*(cf. 5144.1 - Suspension and Expulsion/Due Process)*

The Board perceives the community day school as a flexible component of a comprehensive effort to meet the needs of expelled and other at-risk students throughout the county. The Superintendent or designee shall **collaborate with** ~~solicit input from~~ the County

Superintendent of Schools and, **as appropriate, other neighboring districts** ~~when designing the district community day school and shall collaborate with them in fulfilling countywide needs.~~ **within the county to develop, for Board adoption, a plan for providing education services and appropriate placements to all expelled students in the county. (Education Code 48926)**

~~In order to foster positive attitudes, and academic progress, the Board recognizes that community day schools must~~ **The district's community day school program shall be designed to** give students substantial individual help with their problems. ~~Community day school staff shall collaborate with district counselors, psychologists, and other support staff, and with the county office of education, law enforcement, probation, and human services agency staff who work with at-risk youth. To the extent possible, community day school programs shall provide a low student-teacher ratio as well as individualized instruction and assessment.~~ **To the extent possible, the program shall include:**

1. **Cooperation with the county office of education, law enforcement, probation, and human services agencies personnel who work with at-risk youth**
2. **Low student-teacher ratio**
3. **Individualized instruction and assessment**

**Instruction** BP 6185(b)

**COMMUNITY DAY SCHOOL (continued)**

- 4. Maximum collaboration with district support service resources, including, but not limited to, school counselors and psychologists, academic counselors, and student discipline personnel**

*(cf. 0400 - Comprehensive Plans)*

*(cf. 1020 - Youth Services)*

*(cf. 6164.2 - Guidance/Counseling Services)*

The Superintendent or designee shall establish procedures for the involuntary transfer of students to a community day school in accordance with law, ~~and administrative regulation.~~ **(Education Code 48662)**

The Superintendent or designee may require community day school students to attend school for up to seven days each week in a directed program designed to provide students with the skills and attitudes necessary for success when they are returned to a regular school environment. **(Education Code 48666)**

~~A district desiring to operate a community day school to serve any of grades K-6, but no higher grades, may situate the community day school~~ **A community day school shall not be situated on the same site as an a regular district elementary, middle, junior high, comprehensive senior high, opportunity, or continuation school, except when allowed by law and when the Board certifies by a two-thirds vote that no satisfactory alternative facilities are available for a the-community day school in those grades.** Such Board certification shall be valid for not more than one school year and may be renewed by a subsequent two-thirds vote of the Board. **(Education Code 48661)**

*(cf. 9323.2 - Actions by the Board)*

**Community day schools shall be operated in safe, well-maintained facilities that meet the requirements of Education Code 17292.5.**

**The Superintendent or designee shall regularly report to the Board regarding the academic performance and other outcomes of students enrolled in a community day school.**

*(cf. 0500 - Accountability)*

*(cf. 6190 - Evaluation of the Instructional Program)*

*Legal Reference: (see next page)*

BP 6185(c)

**COMMUNITY DAY SCHOOL (continued)***Legal Reference:*EDUCATION CODE

1980-1986 County community schools

17085-17096 Emergency portable facilities

17280-17316 Field Act, approvals

17365-17374 Field Act, fitness of occupancy

**48260-48273 Truants**

48660-48666 Community day schools

48900-48926 Suspension or expulsion

**52052 Accountability****52064.5 Program evaluation; state evaluation rubrics**WELFARE AND INSTITUTIONS CODE

300 Minors subject to jurisdiction

602 Minors violating laws defining crime; ward of court

**CALIFORNIA CODE OF REGULATIONS, TITLE 5****1068-1074 Alternative schools accountability systems**UNITED STATES CODE, TITLE 20

1400-1482 Individuals with Disabilities Education Act

UNITED STATES CODE, TITLE 29

794 Rehabilitation Act of 1973, Section 504

**CODE OF FEDERAL REGULATIONS, TITLE 34****104.35 Evaluation and placement of students with disabilities***Management Resources:***CDE PROGRAM ADVISORIES**

0306.96 Expulsion Policies and Expulsion Placements, SPB: 95/96 04

**CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS****Guidelines for Establishing a Community Day School**WEB SITESCDE, Educational Options Office: <http://www.cde.ca.gov/spbranch/essdiv/edoptshome.html>California Department of Education: <http://www.cde.ca.gov/sp/eo/cd>

# CSBA Sample Administrative Regulation

**Instruction** AR 6185(a)

## COMMUNITY DAY SCHOOL

### Involuntary Transfer

~~A~~ **The Superintendent or designee may assign a student** ~~may be assigned~~ to a **district** community day school ~~only upon meeting if the student meets~~ one or more of the following conditions: (Education Code 48662)

1. The student is expelled for any reason.

*(cf. 5144.1 - Suspension and Expulsion/Due Process)*

2. The student is probation-referred pursuant to Welfare and Institutions Code 300 ~~and/~~ 602.

3. The student is referred by a school attendance review board (SARB) or other district-level referral process.

*(cf. 5113.1 - Chronic Absence and Truancy)*

**The Superintendent or designee shall give** ~~first~~ priority for assignment to a community day school ~~shall be given~~ to students expelled **for mandatory expulsion offenses** pursuant to Education Code 48915(d). Second priority shall be given to students expelled for other reasons, and third priority shall be given to students referred ~~according~~ **pursuant** to item #2 or #3 above. These priorities are applicable unless ~~the district has~~ **there is** an agreement that the County Superintendent of Schools ~~will shall~~ serve any of ~~the above~~ **these** students. (Education Code 48662)

~~In the case of any student who had been identified as eligible for services~~ **When the student to be involuntarily transferred to a community day school is a student with disabilities, as defined** under the federal Individuals with Disabilities Education Act or Section 504 of the federal Rehabilitation Act of 1973, assignment to a community day school shall be **determined first approved** by the student's ~~individualized Education Program (IEP)~~ **or 504 team, as applicable.** ~~or school site committee (e.g., student study team) as required by law.~~ **(20 USC 1415; 34 CFR 104.35)**

*(cf. 5144.2 - Suspension and Expulsion (Students with Disabilities))*

*(cf. 6159 - Individualized Education Program)*

*(cf. 6164.6 - Identification and Education Under Section 504)*

**expulsion order, probation referral, SARB referral, or other district-level referral process shall be notified in accordance with the applicable laws and/or district policy. Such process**

AR 6185(b)

**COMMUNITY DAY SCHOOL (continued)**

shall include timely written notification of the transfer to the student and his/her parent/guardian and an opportunity for the student and parent/guardian to meet with the Superintendent or designee to discuss the transfer.

At least 10 calendar days prior to the involuntary transfer of a student as a result of a district-level referral process, the Superintendent or designee shall provide written notice of the transfer to the student's parent/guardian or to the adult student age 18 or older. The notice shall contain a statement of the facts and circumstances upon which the transfer is based, its duration, and the conditions for readmission. The notice shall advise the student's parent/guardian or adult student of the opportunity to inspect and obtain copies of all documents supporting the transfer. In addition, the notice shall also state that the parent/guardian or adult student has five school days to request a meeting with the Superintendent or designee to discuss the transfer.

If the Superintendent designates an individual to represent the district at the meeting, the individual so designated shall not be a member of the staff of the school at which the student is currently enrolled.

At the meeting, the reason for the transfer shall be reviewed with the parent/guardian or adult student and the parent/guardian or adult student may present evidence on the student's behalf.

The Superintendent or designee shall send the parent/guardian or adult student written notice of the decision to transfer or not transfer within three school days of the meeting.

If the parent/guardian or adult student desires to appeal the Superintendent's decision to the Board, he/she shall file written notice of the intent to appeal within five school days of receiving the decision. The Board shall determine whether or not to hear the appeal within 15 calendar days. If the Board desires to hear the appeal, the Board shall decide the appeal within 30 calendar days of receipt of the notice of the appeal. The Board's decision shall be final.

**Instruction**

Academic programs offered in the community day school shall be comparable to those available to students of a similar age in the school district. (Education Code 48663)

The minimum school day for a district community day school students shall be 360 minutes of classroom instruction provided by a certificated employee of the district reporting attendance for apportionment purposes. Independent study shall not be used as a means of providing any part of this minimum day. (Education Code 48663)

*(cf. 6112 - School Day)*

*(cf. 6158 - Independent Study)*

AR 6185(c)

**COMMUNITY DAY SCHOOL (continued)**

**Facilities**

To house community day school operations, the district shall do one or more of the following: (Education Code 17292.5)

1. Use available school facilities conforming with Field Act
2. Apply for emergency portable classrooms pursuant to Education Code 17085-17096
3. Upon certifying to the State Allocation Board that all reasonable efforts have been made to use facilities that conform with the Field Act requirements of item #1 above, enter into lease agreements for facilities for which a structural engineer has submitted a report stating that substantial structural hazards do not exist.

Every three years, the Superintendent or designee shall report to the State Allocation Board on the facilities used for the district's community day programs and efforts to place these programs in facilities that conform with the requirements of item #1 above. (Education Code 17292.5)

**Location of the School Site**

A district desiring to operate a community day school to serve any of grades K-6, but no higher grades, may situate the community day school on the same site as an elementary, middle, junior high, comprehensive senior high, opportunity or continuation school when the Board certifies by a two-thirds vote that no satisfactory alternative facilities are available for a community day school in those grades. (Education Code 48661)

A district organized to serve grades K-8, but no higher grades, may situate a community day school on the same site as an elementary, middle, junior high, comprehensive senior high, opportunity or continuation school when the Board certifies by a two-thirds vote that no satisfactory alternative facilities are available for a community day school in those grades. (Education Code 48661)

*(cf. 9323.2 Actions by the Board)*

A district with 2,500 ADA or less, may situate a community day school on the same site as an elementary, middle, junior high, comprehensive senior high, opportunity, or continuation school when the Board certifies by a two-thirds vote that no satisfactory alternative facilities are available for a community day school. (Education Code 48661)

Such Board certifications shall be valid for not more than one school year and may be renewed by a subsequent two-thirds vote of the Board. (Education Code 48661)

# National SD

## Board Bylaw

### Board Bylaws

BB 9121(a)

#### PRESIDENT

The Governing Board shall elect a president from among its members to provide leadership on behalf of the **Board governance team** and the educational community it serves.

*(cf. 9000 - Role of the Board)*

*(cf. 9005 - Governance Standards)*

*(cf. 9100 - Organization)*

~~The president shall preside at all Board meetings. He/she shall:~~ **To ensure that Board meetings are conducted in an efficient, transparent, and orderly manner, the president shall:**

1. Call such meetings of the Board as he/she may deem necessary, giving notice as ~~prescribed~~ **required** by law

*(cf. 9320 - Meetings and Notices)*

*(cf. 9321 - Closed Session Purposes and Agendas)*

2. Consult with the Superintendent or designee on the preparation of Board meeting agendas

*(cf. 9322 - Agenda/Meeting Materials)*

~~3.~~ **3.** Call the meeting to order at the appointed time **and preside over the meeting**

~~2.~~ **4.** Announce the business to come before the Board in its proper order

~~3.~~ **5.** Enforce the Board's ~~policies~~ **bylaws** relating ~~ing~~ to the conduct of meetings and help ensure compliance with applicable requirements of the Brown Act

~~4.~~ **6.** Recognize persons who desire to speak, and protect the speaker who has the floor from disturbance or interference

~~5.~~ ~~Explain what the effect of a motion would be if it is not clear to every member~~

~~6.~~ ~~Restrict discussion to the question when a motion is before the Board~~

**7.** **Facilitate the Board's effective deliberation, ensuring that each Board member has an opportunity to participate in the deliberation and that the discussion remains focused**

~~7.~~ **8.** Rule on issues of parliamentary procedure

BB 9121(b)

**PRESIDENT** (continued)

**8. 9.** Put motions to a vote, and **state** clearly **state** the results of the vote

~~9. Be responsible for the orderly conduct of all Board meetings~~

*(cf. 9323 - Meeting Conduct)*

The president shall have the same rights as other members of the Board, including the right to ~~move, second,~~ discuss, and vote on all **questions matters** before the Board.

The president shall perform other duties in accordance with law and Board policy including, but not limited to:

1. Signing all instruments, acts, ~~and~~ **orders, and resolutions** necessary to **comply with legal requirements and** carry out ~~state requirements and~~ the will of the Board

~~2. Consulting with the Superintendent or designee on the preparation of the Board's agendas~~

*(cf. 9322 - Agenda/Meeting Materials)*

~~3. 2.~~ Working with the Superintendent **or designee** to ensure that Board members have necessary materials and information

~~4. 3.~~ Subject to Board approval, appointing and dissolving all committees

*(cf. 9130 - Board Committees)*

~~5. Calling such meetings of the Board as he/she may deem necessary, giving notice as prescribed by law~~

*(cf. 9320 - Meetings and Notices)*

*(cf. 9321 - Closed Session Purposes and Agendas)*

~~6. 4.~~ **In conjunction with the Superintendent or designee, R**representing the district as ~~governance the Board's~~ spokesperson **in communications with the media** ~~in conjunction with the Superintendent~~

*(cf. 1112 - Media Relations)*

**5. Leading the Board's advocacy efforts to build support within the local community and at the state and national levels**

The president shall have the same rights as other members of the Board, including the right to ~~move, second, discuss and vote on all questions before the Board.~~



BB 9121(c)

**PRESIDENT** (continued)

**The president may participate in the California School Boards Association's Board President's Workshop and other professional development opportunities to enhance his/her leadership skills.**

**(cf. 9240 - Board Training)**

When the president resigns or is absent **or disabled**, the clerk shall perform the president's duties. When both the president and clerk are absent **or disabled**, the Board shall choose a president pro tempore to perform the president's duties.

(cf. 9123 - Clerk)

*Legal Reference:*EDUCATION CODE35022 *President of the board*35143 *Annual organizational meetings; dates and notice*GOVERNMENT CODE54950-54963 *Ralph M. Brown Act**Management Resources:*CSBA PUBLICATIONS**Call to Order: A Blueprint for Great Board Meetings, 2015**Board Presidents' Handbook, revised 2002CSBA Professional Governance Standards, 2000~~Maximizing School Board Leadership: Boardsmanship, 1996~~WEB SITESCSBA: <http://www.csba.org>

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# National SD

## Board Bylaw

Board Bylaws

BB 9220(a)

### GOVERNING BOARD ELECTIONS

#### Board Member Qualifications

Any person is eligible to be a member of the Governing Board, without further qualifications, if he/she is 18 years of age or older, a citizen of California, a resident of the school district, a registered voter, and not legally disqualified from holding civil office. Any person who has been convicted of a felony involving the giving, accepting, or offering of a bribe, embezzlement or theft of public funds, extortion, perjury, or conspiracy to commit any such crime, under California law or the law of another state, the United States of America, or another country, is not eligible to be a candidate for office or **be elected as** a Board member except when he/she has been granted a pardon in accordance with law. (Education Code 35107; Elections Code 20)

A district employee elected to the Board shall resign his/her employment before being sworn in or shall have his/her employment automatically terminated upon being sworn into office. (Education Code 35107)

*(cf. 9224 - Oath of Affirmation)*

*(cf. 9270 - Conflict of Interest)*

**The Board encourages all candidates to become knowledgeable about the role of board members. The Superintendent or designee shall provide all candidates with information that will enable them to understand the responsibilities and expectations of being a Board member, including information regarding available workshops, seminars, and/or training. The Superintendent or designee shall provide all candidates with the county election official's contact information and general information about school programs, district operations, and Board responsibilities.**

*(cf. 9230 - Orientation)*

*(cf. 9240 - Board Training)*

#### Consolidation of Elections

To reduce costs associated with conducting elections, the Board may consolidate Board elections with the local municipal or statewide primary or general election **in accordance with Elections Code 1302. Board election procedures shall be conducted in accordance with state and federal law.**

BB 9220(b)

**GOVERNING BOARD ELECTIONS** (continued)**Elections Process and Procedures**

Board members may reside anywhere within the district's boundaries and shall be elected by all voters in the district.

To ensure ongoing compliance with the California ~~and federal~~ Voting Rights Acts, the Board may review the district's Board election method to determine whether any modification is necessary due to changes in the district's population or any of its racial, color, or language minority group composition. The review shall be based on the Superintendent or designee's report to the Board after the release of each decennial federal census.

If the Board determines that a change is necessary, it shall **hold public hearings in accordance with Elections Code 10100 before** adopting a resolution at an open meeting specifying the change(s), and shall, in accordance with Education Code 5019, ~~or other applicable provisions of law~~—obtain approval from the county committee on school district organization having jurisdiction over the district.

*(cf. 9320 - Meetings and Notices)*

**Campaign Conduct**

**All candidates, including current Board members running as incumbents, shall abide by local, county, state, and federal requirements regarding campaign donations, funding, and expenditures.**

In order to help protect the public's trust in the electoral process as well as the public's confidence in the Board and district, the Board encourages all candidates to sign and adhere to the principles in the Code of Fair Campaign Practices pursuant to Elections Code 20440.

*(cf. 0410 - Nondiscrimination in District Programs and Activities)*

*(cf. 9005 - Governance Standards)*

**Statement of Qualifications**

On the 125th day prior to the day fixed for the general district election, the Board secretary or his/her designee shall deliver a notice, bearing the secretary's signature and district seal, to the county elections official describing both of the following: (Elections Code 10509)

1. The elective offices of the district to be filled at the general election and which offices, if any, are for the balance of an unexpired term
2. Whether the district or the candidate is to pay for the publication of a statement of qualifications pursuant to Elections Code 13307

BB 9220(c)

**GOVERNING BOARD ELECTIONS** (continued)*(cf. 9223 - Filling Vacancies)*

**Candidates for the Board may submit a candidate statement to the elections official for inclusion in the voter's pamphlet.** Candidate statements shall be limited to no more than 200 words. (Elections Code 13307)

**When the elections official allows for the electronic distribution of candidate statements, a candidate for the Board may, in addition to or instead of submitting a candidate statement for inclusion in the mailed voter's pamphlet, prepare and submit a candidate statement for electronic distribution.**

The district shall assume no part of the cost of printing, handling, translating, ~~or~~ mailing, **or electronically distributing** of candidate statements filed pursuant to Elections Code 13307. As a condition of having candidate statements included in the **hard copy and/or electronic** voter's pamphlet, the district may require candidates to pay their estimated pro rata share of these costs to the district in advance pursuant to Elections Code 13307.

**Tie Votes in Board Member Elections**

Whenever a tie makes it impossible to determine which of two or more candidates has been elected to the Board, the Board shall immediately notify the candidates who received the tie votes of the time and place where the candidates or their representatives should appear before the Board. The Board at that time shall determine the winner by lot. (Education Code 5016)

*Legal Reference:*EDUCATION CODE~~1000 Composition, and trustee area, county board of education~~

1006 Qualifications for holding office, county board of education

5000-5033 Elections

5220-5231 Elections

5300-5304 General provisions (conduct of elections)

5320-5329 Order and call of elections

5340-5345 Consolidation of elections

5360-5363 Election notice

5380 Compensation (of election officer)

5390 Qualifications of voters

5420-5426 Cost of elections

5440-5442 Miscellaneous provisions

7054 Use of district property

35107 Eligibility; school district employees

35177 Campaign expenditures or contributions

BB 9220(d)

**GOVERNING BOARD ELECTIONS** (continued)

35239 *Compensation of governing board member of districts with less than 70 ADA*

ELECTIONS CODE

20 *Public office eligibility*  
 1302 *Local elections, school district election*  
 2201 *Grounds for cancellation*  
 4000-4004 **4008** *Elections conducted wholly by mail*

**10010** *District boundaries*

10400-10418 *Consolidation of elections*  
 10509 *Notice of election by secretary*  
 10600-10604 *School district elections*  
 13307 *Candidate's statement*

**13308** *Candidate's statement contents*

13309 *Candidate's statement, indigence*  
 14025-14032 *California Voting Rights Act*

**14050-14057** *California Voter Participation Rights Act*

20440 *Code of Fair Campaign Practices*

GOVERNMENT CODE

1021 *Conviction of crime*  
 1097 *Illegal participation in public contract*  
 12940 *Nondiscrimination, Fair Employment and Housing Act*  
 81000-91014 *Political Reform Act*

PENAL CODE

68 *Bribes*  
 74 *Acceptance of gratuity*  
 424 *Embezzlement and falsification of accounts by public officers*  
 661 *Removal for neglect or violation of official duty*

CALIFORNIA CONSTITUTION

Article 2, Section 2 *Voters, qualifications*  
 Article 7, Section 7 *Conflicting offices*  
 Article 7, Section 8 *Disqualification from office*

UNITED STATES CODE, TITLE ~~42~~ 52

~~1973-1973aa-6-10301-10508~~ *Voting Rights Act*

COURT DECISIONS

*Rey v. Madera Unified School District*, (2012) ~~138 Cal. Rptr. 3d 192-203~~ **203 Cal. App. 4th 1223**

*Randall v. Sorrell*, (2006) 126 S.Ct. 2479

*Sanchez v. City of Modesto*, (2006) ~~51 Cal. Rptr. 3d 821~~ **145 Cal. App. 4th 660**

*Dusch v. Davis*, (1967) 387 U.S. 112

ATTORNEY GENERAL OPINIONS

85 *Ops. Cal. Atty. Gen.* 49 (2002)

83 *Ops. Cal. Atty. Gen.* 181 (2000)

81 *Ops. Cal. Atty. Gen.* ~~98~~ **94** (1998)

69 *Ops. Cal. Atty. Gen.* 290 (1986)

Management Resources:

**CALIFORNIA SCHOOL BOARDS ASSOCIATION PUBLICATIONS**

BB 9220(e)

**GOVERNING BOARD ELECTIONS** (continued)

**Legal Alert on the Impact of Senate Bill No. 415 on School Board Elections, January 2017**

**WEB SITES**

CSBA: <http://www.csba.org>

California Secretary of State's Office: <http://www.ss.ca.gov> <http://www.sos.ca.gov>

Fair Political Practices Commission: <http://www.fppc.ca.gov>

Institute for Local Self Government: <http://www.ca-ilg.org>

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# National SD

## Board Bylaw

Board Bylaws

BB 9230(a)

### ORIENTATION

#### **Board Candidate Orientation**

The Governing Board desires to provide Board candidates with information that will enable them to understand the responsibilities and expectations of Board membership. The Superintendent or designee shall provide all candidates with general information about school programs, district operations, and Board responsibilities and the county election official's contact information.

*(cf. 9200 - Limits of Board Member Authority)*

*(cf. 9220 - Governing Board Elections)*

*(cf. 9270 - Conflict of Interest)*

The Board encourages all candidates to attend public Board meetings during the period of their candidacy. Candidates shall have the same access as members of the public to district staff and information.

*(cf. 1340 - Access to District Records)*

*(cf. 9011 - Disclosure of Confidential/Privileged Information)*

#### **New Board Member Orientation**

The Governing Board recognizes the importance of providing all newly elected or appointed Board members with support and information to assist them in becoming effective members of the Board. Incoming Board members shall be provided an orientation designed to build their knowledge of the district and an understanding of the responsibilities of their position. Such orientation may include the provision of information, support, and/or training related to Board functions, policies, protocols, and standards of conduct.

*(cf. 9000 - Role of the Board)*

*(cf. 9220 - Governing Board Elections)*

*(cf. 9223 - Filling Vacancies)*

As early as possible following the election or appointment of Board members, one or more orientation sessions shall be held during open meeting(s) of the Board. The Board president and the Superintendent or designee shall develop an agenda for the meeting(s) and shall identify resources that may be useful for incoming Board members.

*(cf. 9121 - President)*

BB 9230(b)

**ORIENTATION** (continued)

~~The Board shall convene a meeting to provide an orientation and information to incoming Board members to assist them in understanding the Board's functions, policies, procedures, protocols, and agreed-upon standards of conduct. Incoming Board members shall receive the district's policy manual and other materials related to the district and Board member responsibilities.~~

Upon their election **or appointment**, incoming Board members shall be provided a copy of the Brown Act and informed that, pursuant to Government Code 54952.1, they must conform to the Act's requirements as if they had already assumed office. **Additional information for incoming Board members may include, but is not limited to, Board bylaws related to the limits of individual Board member authority, the conduct of Board meetings, and other Board operations; governance standards for ethical conduct; legal requirements related to conflict of interest and prohibited political activity; protocols for speaking with district staff, members of the public, and the media; and publications on effective governance practices.**

*(cf. 1112 - Media Relations)*

*(cf. 1160 - Political Processes)*

*(cf. 9005 - Governance Standards)*

*(cf. 9010 - Public Statements)*

*(cf. 9011 - Disclosure of Confidential/Privileged Information)*

*(cf. 9012 - Board Member Electronic Communications)*

*(cf. 9200 - Limits of Board Member Authority)*

*(cf. 9270 - Conflict of Interest)*

*(cf. 9323 - Meeting Conduct)*

**In addition, the Superintendent may or designee shall provide incoming Board members with additional specific background and information regarding the district, including, but not limited to, the district's vision and goals statements, operations, and current challenges in areas that include, but are not limited to, student achievement, curriculum, finance, facilities, policy, human resources, and collective bargaining. local control and accountability plan and other comprehensive plans, student demographic data, student achievement data, district policy manual, district budget, and minutes of recent open Board meetings.**

*(cf. 0000 - Vision)*

*(cf. 0200 - Goals for the School District)*

*(cf. 0400 - Comprehensive Plans)*

*(cf. 0460 - Local Control and Accountability Plan)*

**The Superintendent or designee may offer incoming Board members a tour of district schools and facilities, and may introduce them to district and school site administrators and other staff.**

~~Incoming members are encouraged to attend Board meetings and review agenda materials available to the public in order to become familiar with current issues facing the district.~~



BB 9230(c)

**ORIENTATION** (continued)

Incoming members ~~also may be encouraged~~, at district expense, ~~to attend the California School Boards Association's Orientation for New Trustees, Institute for New and First-Term Board Members, and~~ workshops and conferences relevant to their individual needs ~~or to the needs of the individual member~~, the Board as a whole, or the district.

(cf. 9240 - Board Training)

(cf. 9320 - Meetings and Notices)

*Legal Reference:*EDUCATION CODE

33360 Department of Education and statewide association of school district boards; annual workshops

33362-33363 Reimbursement of expenses; board member or member-elect

ELECTIONS CODE

13307 Candidate's statement

20440 Code of Fair Campaign Practices

GOVERNMENT CODE

54950-54963 The Ralph M. Brown Act, especially:

54952.1 Member of a legislative body

**54952.2 Open meeting laws; posting agenda; board actions**

54952.7 Copies of Brown Act to board members

*Management Resources:*CSBA PUBLICATIONS

~~School Board Leadership, 2007~~

~~Professional Governance Standards for School Boards, 2000~~

~~The Brown Act: School Boards and Open Meeting Laws, rev. 2007~~ 2009

~~Guide to Effective Meetings, 2007~~

~~Maximizing School Board Leadership, 1996~~

NATIONAL SCHOOL BOARDS ASSOCIATION PUBLICATIONS

~~Becoming a Better Board Member: A Guide to Effective School Board Service, 2006~~

WEB SITES

CSBA: <http://www.csba.org>

~~Fair Political Practices Commission: <http://www.fppe.ca.gov>~~

~~National School Boards Association: <http://www.nsba.org>~~

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**Exhibit**  
**Conflict Of Interest**

E 9270  
**Board Bylaws**

RESOLUTION ADOPTING A  
CONFLICT OF INTEREST CODE

WHEREAS, the Political Reform Act, Government Code 87300-87313, requires each public agency in California to adopt a conflict of interest code; and

WHEREAS, the Governing Board of the National School District has previously adopted a local conflict of interest code; and

WHEREAS, past and future amendments to the Political Reform Act and implementing regulations may require conforming amendments to be made to the district's conflict of interest code; and

WHEREAS, a regulation adopted by the Fair Political Practices Commission, 2 CCR 18730, provides that incorporation by reference of the terms of that regulation, along with an agency-specific appendix designating positions and disclosure categories shall constitute the adoption and amendment of a conflict of interest code in conformance with Government Code 87300 and 87306; and

WHEREAS, the National School District has recently reviewed its positions, and the duties of each position, and has determined that (changes/no changes) to the current conflict of interest code are necessary; and

WHEREAS, any earlier resolutions, bylaws, and/or appendices containing the district's conflict of interest code shall be rescinded and superseded by this resolution and Appendix; and

NOW THEREFORE BE IT RESOLVED that the National School District Governing Board adopts the following Conflict of Interest Code including its Appendix of Designated Employees and Disclosure Categories.

PASSED AND ADOPTED THIS \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ at a meeting, by the following vote:

AYES: \_\_\_\_\_ NOES: \_\_\_\_\_ ABSENT: \_\_\_\_\_

Attest:

\_\_\_\_\_  
Secretary/President

## Conflict of Interest Code of the National School District

The provisions of 2 CCR 18730 and any amendments to it adopted by the Fair Political Practices Commission, together with the attached Appendix specifying designated positions and disclosure categories, are incorporated by reference and shall constitute the district's conflict of interest code.

Governing Board members and designated employees shall file a Statement of Economic Interest/Form 700 in accordance with the disclosure categories listed in the attached Appendix. The Statement of Economic Interest shall be filed with the district's filing officer and/or, if so required, with the district's code reviewing body. The district's filing officer shall make the statements available for public review and inspection.

### APPENDIX

#### Disclosure Categories

1. Category 1: A person designated Category 1 shall disclose:
  - a. Interests in real property located entirely or partly within district boundaries, or within two miles of district boundaries, or of any land owned or used by the district.
  - b. Investments or business positions in or income from sources which are engaged in the acquisition or disposal of real property within the district, are contractors or subcontractors which are or have been within the past two years engaged in work or services of the type used by the district, or manufacture or sell supplies, books, machinery, or equipment of the type used by the district.
2. Category 2: A person designated Category 2 shall disclose:
  - a. Investments or business positions in or income from sources which are contractors or subcontractors engaged in work or services of the type used by the department which the designated person manages or directs.
  - b. Investments or business positions in or income from sources which manufacture or sell supplies, books, machinery, or equipment of the type used by the department which the designated person manages or directs. For the purposes of this category, a principal's department is his/her entire school.
3. Full Disclosure: Because it has been determined that the district's Board members and/or Superintendent "manage public investments," they and other persons designated for "full disclosure" shall disclose, in accordance with Government Code 87200:
  - a. Interests in real property located entirely or partly within district boundaries, or within

two miles of district boundaries, or of any land owned or used by the district.

b. Investments, business positions, and sources of income, including gifts, loans, and travel payments.

#### Designated Positions

##### Designated Position Disclosure Category

Governing Board Members	1
Superintendent	1
Assistant Superintendent	1
Purchasing Supervisor	1
<b>Director of Human Resources</b>	<b>1</b>
Director of Business Services	1
Director of Maintenance and Operations	1
Director of Technology and Student Assessment	1
Director of Student Support Services	1
Director of Educational Services	1
Principal	2
Director	2
Program Coordinator	2
Supervisor	2

#### Disclosures for Consultants

Consultants are designated employees who must disclose financial interests as determined on a case-by-case basis by the Superintendent or designee. The Superintendent or designee's written determination shall include a description of the consultant's duties and a statement of the extent of disclosure requirements based upon that description. All such determinations are public records and shall be retained for public inspection along with this conflict of interest code.

A consultant is an individual who, pursuant to a contract with the district, makes a governmental decision whether to: (2 CCR 18701)

1. Approve a rate, rule, or regulation
2. Adopt or enforce a law
3. Issue, deny, suspend, or revoke a permit, license, application, certificate, approval, order, or similar authorization or entitlement
4. Authorize the district to enter into, modify, or renew a contract that requires district approval
5. Grant district approval to a contract that requires district approval and in which the

district is a party, or to the specifications for such a contract

6. Grant district approval to a plan, design, report, study, or similar item
7. Adopt or grant district approval of district policies, standards, or guidelines

A consultant is also an individual who, pursuant to a contract with the district, serves in a staff capacity with the district and in that capacity participates in making a governmental decision as defined in 2 CCR 18702.2 or performs the same or substantially all the same duties for the district that would otherwise be performed by an individual holding a position specified in the district's conflict of interest code. (2 CCR 18701)

Exhibit NATIONAL SCHOOL DISTRICT  
version: May 11, 2011 National City, California

# National SD

## Board Bylaw

### Board Self-Evaluation

BB 9400(a)

#### Board Bylaws

The Governing Board shall annually conduct a self-evaluation in order to demonstrate accountability to the community and ensure that district governance effectively supports student achievement and the attainment of the district's vision and goals.

*(cf. 0000 - Vision)*

*(cf. 0200 - Goals for the School District)*

*(cf. 2140 - Evaluation of the Superintendent)*

The evaluation may address any areas of Board responsibility, including, but not limited to, Board performance in relation to vision setting, curriculum, personnel, finance, policy **development**, collective bargaining, community relations, **and advocacy**. The evaluation **also** may **also** address objectives related to Board meeting operations, relationships among Board members, relationship with the Superintendent, understanding of Board and Superintendent roles and responsibilities, communication skills, or other **governance or** boardmanship skills.

*(cf. 9000 - Role of the Board)*

*(cf. 9005 - Governance Standards)*

The Board shall **be** evaluated **itself** as a whole. Individual Board members **also** are **also** ~~encouraged~~ **expected** to use the evaluation process as an opportunity to ~~privately~~ **assess** **and** **set goals for** their own personal performance.

Each year, the Board, with assistance from the Superintendent, shall determine an evaluation method or instrument that measures ~~a reasonable number of~~ **key components of board responsibility and** previously identified performance objectives. ~~Videotape~~ **Visual and/or audio recordings** of a Board meeting may **only** be used as an evaluation tool ~~only with the~~ **when** consent ~~of is given by~~ all Board members.

Any discussion ~~of~~ **involving** the Board's self-evaluation shall be conducted in open session.

At the request of the Board, a facilitator may be used to assist with the evaluation process. The Board may invite the Superintendent or others **individual(s) with pertinent information** to provide input into the evaluation process.

Following the evaluation, the Board shall ~~develop strategies for strengthening Board performance~~ **set goals, define and/or refine protocols, and shall** establish priorities and objectives for the following year's evaluation. **The Board shall also develop strategies for strengthening Board performance based on identified areas of need, including, but not limited to, Board trainings such as those offered by the California School Boards Association.**

BB 9400(b)

**BOARD SELF-EVALUATION** (continued)

(cf. 9230 - Orientation)

(cf. 9240 - Board Training)

*Legal Reference:*

GOVERNMENT CODE

54950-54963 *Brown Act; board self-evaluations not covered*

*Management Resources:*

CSBA PUBLICATIONS

**Professional Governance Standards**

**Defining Governance, Issue 3: Governance Practices, Governance Brief, April 2014**

~~Professional Governance Standards, 2000~~

~~Maximizing School Board Leadership, 1996~~

WEB SITES

CSBA: <http://www.csba.org>

CSBA Board Self-Evaluation: <http://bse.csba.org>

(9/88 3/02) 7/17

**Policy Reference UPDATE Service**

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