

# LAKESIDE UNION SCHOOL DISTRICT

Office of the Superintendent  
12335 Woodside Avenue  
Lakeside, California 92040  
(619) 390-2600

**April 11, 2024**

Closed Session: 5:00 p.m.

Open Session: 6:00 p.m.

## NOTICE OF THE REGULAR MEETING OF THE BOARD OF TRUSTEES

Members of the public who require disability modification or accommodation in order to participate in the meeting should contact the Superintendent's Office at (619) 390-2606 or in writing, at least twenty-four (24) hours before the meeting. (Government Code section 54954.2).

If you wish to speak under Public Comment, complete the **Public Comment Form**. Advance written information regarding the subject will be appreciated so that all might be better informed regarding the matter. In the interest of time and order, presentations from the public are limited to four (4) minutes per person.

### A. CALL TO ORDER AND ROLL CALL – 5:00PM

### B. OPPORTUNITY FOR MEMBERS OF THE PUBLIC TO ADDRESS THE BOARD ON ANY ITEM DESCRIBED IN THIS NOTICE (GOVERNMENT CODE SECTION 54954.3) Public Comment Form

Opportunity for Members of the Public to address the Board on any item **on or off** the agenda. In the interest of time and order, presentations from the public are limited to four (4) minutes per person. An individual speaker's allotted time may not be increased by a donation of time from members of the public in attendance. If you wish to speak under Public Comment or Public Hearings, follow the directions for speaking to agenda items as listed above.

### C. CLOSED SESSION – 5:00PM

1. Conference with Legal Counsel (WPCH Law Firm) – Existing Litigation – Superior Court Case #37-2023-00055188-CU-PO-CTL pursuant to Government Code §54956.9; and
2. Public Employee Discipline/Dismissal/Release pursuant to Government Code §54957; and
3. Public Employee Evaluation, Superintendent, pursuant to Government Code §54957.

### D. OPENING PROCEDURES – 6:00PM

1. Reconvene
2. Welcome Visitors
3. Closed Session Report
4. The Pledge of Allegiance will be led by students from Riverview and Winter Gardens. Following the pledge Principal Grace Cox will share highlights from the school.

### E. TRUSTEE REPORTS AND COMMENTS

Trustees will report and comment as desired.

### F. PRESENTATION

Education Services Coordinator, Michelle Perkins, will present information on the History/Social Science curriculum pilot and adoption recommendations. Adoption on the curriculum will come before the Board at the May meeting.

G. OPPORTUNITY FOR MEMBERS OF THE PUBLIC TO ADDRESS THE BOARD ON ANY ITEM DESCRIBED IN THIS NOTICE (GOVERNMENT CODE SECTION 54954.3) Public Comment Form

Opportunity for Members of the Public to address the Board on any item on the agenda. In the interest of time and order, presentations from the public are limited to four (4) minutes per person. An individual speaker's allotted time may not be increased by a donation of time from members of the public in attendance. If you wish to speak under Public Comment or Public Hearings, follow the directions for speaking to agenda items as listed above.

H. ITEMS OF BUSINESS

1.1 Designate consent agenda items.

Note: Consent agenda items are generally routine items of business. The Board will designate those items to be approved as a whole, unless a member of the public requests consideration of an item on an individual basis. The Board will review and act on the remaining items of business.

1.2 Discussion/adoption of consent agenda items.

SUPERINTENDENT

2.1 **Adoption** is requested of the minutes of the regular board meeting of March 14, 2024, and the special board meeting of March 18, 2024.

2.2 **Adoption** is requested of Resolution No. 2024-18, proclaiming Wednesday, May 1, 2024 as Day of the Teacher in the Lakeside Union School District and expressing gratitude for their dedication and the instruction, care and support they provide the students.

HUMAN RESOURCES

3.1 **Approval/Ratification** is requested of Personnel Assignment Order 2024-11.

3.2 **Adoption** is requested of Resolution No. 2024-19, in the matter of reducing or discontinuing particular kinds of classified services for the 2024-25 school year implementing Education Code Nos. §45114, 45117, 45298, and 45308.

BUSINESS SERVICES

4.1 **Approval** is requested of the following monthly business reports: A) Commercial Warrants; B) Revolving Cash; C) Purchase Orders and Change Orders; and D) Purchase Card Expenditures.

4.2 **Approval** is requested of the following annual contracts for the 2023-2024 school year: A) Boys to Men Mentoring Network, Inc. (LMS); B) Apple Direct (Business Services); C) Connect4Kids Psychological Services (Special Ed); D) Professional Tutors of America, Inc. (Special Ed); E) Jennifer Collado-Perez, The Koonings Center (Special Ed); F) Tiara Stoudenmire (Special Ed); G) Jan Landau (LC); H) Brian Moehl, San Diego Audubon Society (LC); I) Rob Riingen Photography (TdS); J) JT ADHD Coaching (Special Ed); K) Rancho Coastal Speech Therapy (Special Ed); L) Total Compensation Systems, Inc. (Business Services); M) Health and Human Services Agency (Ed Services); and N) Eastern San Diego County Jr. Fair (District/Maint).

4.3 **Adoption** is requested of Resolution No. 2024-17, approving the California State Teachers' Retirement System (CalSTRS) Retirement Incentive Program, contingent upon receiving 5 total retirees to June 30, 2024.

H. BUSINESS SERVICES (CONTINUED)

- 4.4 **Review/Approval** is requested of the 2022-23 Bond Annual Audit Report by Wilkinson Hadley King & Co. LLP.
- 4.5 **Approval** is requested of a Memorandum of Understanding with California School Employees Association and its Chapter 240 for the 2024-25 work calendar.
- 4.6 **Denial** is requested of a Claim Against the District for a claim for windshield damage.
- 4.7 **Approval** is requested of the following gifts to the District: A) Poway Valley Garden Club donated \$500 to the Lakeside Middle School FFA program; and B) March PTA donations: \$646 to Lakeside Farms, and \$1,750 to Winter Gardens.

BOARD POLICIES, ADMINISTRATIVE REGULATIONS AND/OR EXHIBITS

- 5.1 **Approval** is requested for Administrative Regulation 4161.2/4261.2/4361.2: Personal Leaves.
- 5.2 **Approval** is requested for Administrative Regulation 4161.8/4261.8/4361.8: Family Care and Medical Leave.
- 5.3 **Approval** is requested for Board Policy 5131.9: Academic Honesty.
- 5.4 **Approval** is requested for Administrative Regulation and Exhibit 5145.71: Title IX Sexual Harassment Complaint Procedures.
- 5.5 **Approval** is requested of a number change to Board Policy 1270: Public Art to now be 1270.5.

I. DISCUSSION ITEMS

Miscellaneous:

1. Enrollment Report for Month 7 (February 5 – March 1, 2024)
2. Legislative Updates

First Readings:

3. Board Policy and Administrative Regulation 0460: Local Control and Accountability Plan.
4. Board Policy and Administrative Regulation 1312.3: Uniform Complaint Procedures.
5. Board Policy and Administrative Regulation 3311: Bids.
6. Board Policy and Administrative Regulation 3400: Management of District Assets/Accounts.
7. Board Policy and Administrative Regulation 4112.2: Certification.
8. Board Policy 4154/4254/4354: Health and Welfare Benefits.

J. REPORTS TO THE BOARD

1. Union Representatives:
  - A. **Kerry Strong**, will present comments as the Lakeside Teachers Association President.
  - B. **David Myers**, will present comments as the California School Employees Association President.
2. District Superintendents
  - A. **Lisa Davis** will present business and operations updates.
  - B. **Dr. Natalie Winspear** will present educational services updates.
  - C. **Dr. Rhonda Taylor** will present on district updates.

*“Igniting Passion in Today’s Students for Tomorrow’s Opportunities”*

*Lakeside Union School District*  
Board of Trustees Agenda  
April 11, 2024

K. ADJOURNMENT

Respectfully Submitted,

*Rhonda L. Taylor, Ed.D.*  
Superintendent

# LAKESIDE UNION SCHOOL DISTRICT

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**Governing Board Meeting Date:** 4/11/24

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**Agenda Item:**

Approval of Minutes

**Background (Describe purpose/rationale of the agenda item):**

It is recommended that the Board of Trustees approve the attached minutes with any necessary modifications:

Regular Board Meeting of March 14, 2024

Special Board Meeting of March 18, 2024

**Fiscal Impact (Cost):**

N/A

**Funding Source:**

N/A

**Recommended Action:**

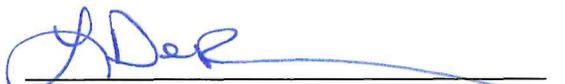
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|----------------------------------------------|---------------------------------------------------------------------------------|
| <input type="checkbox"/> Informational       | <input type="checkbox"/> Denial                                                 |
| <input type="checkbox"/> Discussion          | <input type="checkbox"/> Ratification                                           |
| <input type="checkbox"/> Approval            | <input type="checkbox"/> Explanation: <a href="#">Click here to enter text.</a> |
| <input checked="" type="checkbox"/> Adoption |                                                                                 |

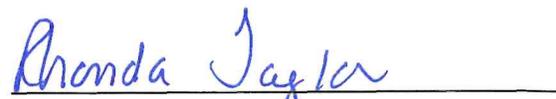
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**Originating Department/School:** Superintendent's Office

**Submitted/Recommended By:**

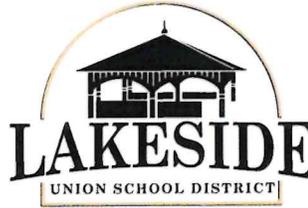
**Approved for Submission to the Governing Board:**

  
\_\_\_\_\_  
Lisa DeRosier, Executive Assistant

  
\_\_\_\_\_  
Dr. Rhonda Taylor, Superintendent

Administration:

RHONDA L. TAYLOR, Ed.D.  
*Superintendent*  
NATALIE WINSPEAR, Ed.D.  
*Assistant Superintendent*  
LISA DAVIS  
*Assistant Superintendent*



Board of Trustees:

JIM BENNETT  
AUTUMN ELLENSON  
ANDREW HAYES  
LARA HOEFER MOIR  
RON KASPER

*Minutes of the Special Meeting of the Board of Trustees*

March 18, 2024

District Administration Center

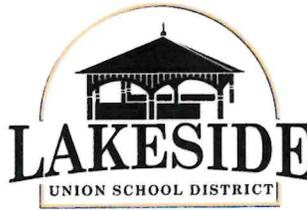
- |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                   |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------|
| <p>A. The special meeting of the Lakeside Union School District Board of Trustees was called to order at 4:58 p.m. by Lara Hoefer Moir, Vice President, with the following members present; Jim Bennett, Clerk; and Autumn Ellenson, Member. Also in attendance were Dr. Rhonda Taylor, Superintendent; Dr. Natalie Winspear, Assistant Superintendent. President Andrew Hayes, Member Ron Kasper, and Assistant Superintendent, Lisa Davis, were absent. Lisa DeRosier was present to record the minutes.</p> | <p>Call to Order</p>                              |
| <p>B. There were no requests to speak to the Board.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <p>Public<br/>Comments</p>                        |
| <p>C. 1. <u>It was moved by</u> Member Ellenson and seconded by Clerk Bennett to adopt the job descriptions for the following positions: A) K-8 Academy Principal (Management); B) School Principal – Elementary (Management); C) School Principal – Middle School (Management); and D) Vice Principal (Management). Motion carried unanimously 3:0:2 (<u>Ayes:</u> Bennett, Ellenson, Hoefer Moir; <u>Absent:</u> Hayes, Kasper).</p>                                                                         | <p>Adopt Job<br/>Descriptions</p>                 |
| <p>2. <u>It was moved by</u> Clerk Bennett and seconded by Member Ellenson to approve the management salary schedule to include K-8 Academy Principal; School Principal – Elementary; School Principal – Middle School; and Vice Principal. Motion carried unanimously 3:0:2 (<u>Ayes:</u> Bennett, Ellenson, Hoefer Moir; <u>Absent:</u> Hayes, Kasper).</p>                                                                                                                                                  | <p>Approve<br/>Management<br/>Salary Schedule</p> |
| <p>3. <u>It was moved by</u> Member Ellenson and seconded by Clerk Bennett to adopt Personnel Assignment Order 2024-10. Motion carried unanimously 3:0:2 (<u>Ayes:</u> Bennett, Ellenson, Hoefer Moir; <u>Absent:</u> Hayes, Kasper).</p>                                                                                                                                                                                                                                                                      | <p>Adopt PAO</p>                                  |
| <p>D. Vice President Hoefer Moir asked if there was any further business to come before the board. There being none, the president declared the regular board meeting adjourned at 5:01 p.m.</p>                                                                                                                                                                                                                                                                                                               | <p>Adjournment</p>                                |

Rhonda L. Taylor, Ed.D.  
Secretary to the Board

Jim Bennett  
Clerk of the Board

Administration:

RHONDA L. TAYLOR, Ed.D.  
*Superintendent*  
NATALIE WINSPEAR, Ed.D.  
*Assistant Superintendent*  
LISA DAVIS  
*Assistant Superintendent*



Board of Trustees:

JIM BENNETT  
AUTUMN ELLENSON  
ANDREW HAYES  
LARA HOEFER MOIR  
RON KASPER

*Minutes of the Regular Meeting of the Board of Trustees*

March 14, 2024  
District Administration Center

- |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                        |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------|
| <p>A. The regular meeting of the Lakeside Union School District Board of Trustees was called to order at 5:30 p.m. by Lara Hoefer Moir, Vice President with the following members present: Jim Bennett, Clerk; Autumn Ellenson, Member; and Ron Kasper, Member. Also in attendance were Dr. Rhonda Taylor, Superintendent; Dr. Natalie Winspear, Assistant Superintendent; and Lisa Davis, Assistant Superintendent. President Andrew Hayes was absent. Lisa DeRosier was present to record the minutes.</p>                                                                                                                                                                                            | <p>Call to Order</p>                   |
| <p>B. There were no requests to speak to the Board prior to closed session.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <p>Public<br/>Comments</p>             |
| <p>C. At 5:31 p.m., the Governing Board moved to closed session to discuss the following: 1) Public Employee Discipline/Dismissal/Release, pursuant to Government Code §54957; and 2) Public Employee Evaluation, Superintendent, pursuant to Government Code §54957.</p>                                                                                                                                                                                                                                                                                                                                                                                                                               | <p>Closed Session</p>                  |
| <p>D. The Board reconvened at 6:00 p.m. Vice President Hoefer Moir welcomed visitors and reported on closed session items as follows:</p> <ol style="list-style-type: none"> <li>1. No action was taken on Public Employee Discipline/Dismissal/Release, pursuant to Government Code §54957.</li> <li>2. No action was taken on Public Employee Evaluation, Superintendent, pursuant to Government Code §54957.</li> </ol>                                                                                                                                                                                                                                                                              | <p>Reconvene<br/>Welcome Visitors</p>  |
| <p>Students from Tierra del Sol Middle School led the pledge of allegiance. Following the pledge, Principal Dr. Leslie Hardiman and Vice Principal Paula Macias-Gonzalez shared highlights from the school and programs. Dr. Hardiman spoke about the great things going on at Tierra del Sol Middle School. Some highlights shared were: the school’s shared vision; SEL; counseling on campus; “newcomers” support; reclassifications; reviewed CHKS data; mentoring programs; Crew; positive referrals; electives and clubs; dance; band guitar; drama; and so much more!</p>                                                                                                                        | <p>Flag Salute<br/>TdS Spotlight</p>   |
| <p>E. The Board recognized Lindo Park’s safety patrol captain, Andres Librado, as the Honorary Colonel of Lakeside. Andres competed in a County competition in February.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <p>Recognized<br/>Honorary Colonel</p> |
| <p>F. 1. Lisa Davis presented the Second Interim Financial report. She commented that not a lot has changed since the last presentation. She shared how the district is funded: 54-64% State; 32-36% local; and 6-23% Federal funding. The pandemic dollars have dried up. We need \$38.5 million to run the district each year. The big 3 that fund California are: personal income tax, sales tax, and corporate tax. The amount of people leaving the State is hurting our contributions. Ms. Davis attended the governor’s budget and the State is in a \$73 billion deficit. There will be significant changes to the budget between now and the May revise. Our other funds are looking good.</p> | <p>Budget Report</p>                   |

F. PRESENTATION/ACTION ITEM (CONTINUED)

2. It was moved by Clerk Bennett and seconded by Member Ellenson to approve the revised Second Interim Financial Report, with actuals as of January 31, 2024 of the District's Statement of Positive Certification indicating the District's ability to meet its financial obligations for the 2023-2024 fiscal and two subsequent fiscal years. Motion carried unanimously 4:0:1 (Ayes: Bennett, Ellenson, Hoefler Moir, Kasper; Absent: Hayes).

Approve Second Interim Financial Report

- G. Clerk Bennett had no formal report.

Trustee Reports and Comments

Member Ellenson had no formal report.

Member Kasper attended the Lemon Crest and Lindo Park love of reading days. He hopes to see everyone at the upcoming family events in the community, including: Lakeside rodeo, Western Days Parade, pageantry, spaghetti dinner, auction, etc.

Vice President Hoefler Moir attended the Touch-a-Truck event. She commented that it was a wonderful event and 3,000 tickets were sold. The school bus with the slide is always popular. She encouraged everyone to come out to the Jr. Fair BBQ and auction on Sunday.

Public Comments

- H. There were no requests to speak to the Board.

- I. It was moved by Member Ellenson and seconded by Member Kasper to designate all Items of Business to the consent agenda with the exception of Item 4.7. The motion carried unanimously to designate Items of Business 2.1, 3.1, 4.1, 4.2, 4.3, 4.4, 4.5, 4.6, 5.1, 5.2, 6.1, 6.2, 6.3, 6.4, and 6.5 to the consent agenda.

Consent Agenda

- 1.1 It was moved by Member Ellenson and seconded by Clerk Bennett to adopt the following items of business:

Items of Business

- 1.2 There was no discussion on items.

Discussion

SUPERINTENDENT

- 2.1 A motion to adopt the minutes of the regular board meeting of February 15, 2024 and the special board meeting of February 29, 2024.

Adopt Minutes

HUMAN RESOURCES

- 3.1 A motion to approve/ratify Personnel Assignment Order 2024-09.

Adopt PAO

BUSINESS SERVICES

- 4.1 A motion to approve the following monthly business reports: A) Commercial Warrants; B) Purchase Orders and Change Orders; and C) Purchase Card Expenditures.

Approve Bus Reports

- 4.2 A motion to approve the following annual contracts for the 2023-2024 school year: A) Western Sign & Awning (LP); B) Dave Bang Associates, Inc. (Maint/RV); C) Math Transformations (LMS); D) Jason Degtyarev, Psy.D. (Special Ed); E) Dennis Cook Roofing, Inc. (Maint); F) April K. Robinson (Special Ed); G) DS&C (Business Services); H) Premiere Speakers Bureau dba National Speakers Bureau, Inc. (Supt); and I) The Koonings Center (Special Ed).

Approve Annual Contracts

I. BUSINESS SERVICES (CONTINUED)

- |     |                                                                                                                                                                                                                  |                                      |
|-----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------|
| 4.3 | A motion to approve Change Orders #1 and #2 with GEM Industrial, Inc. for the kitchen project in the amount of \$20,907.41.                                                                                      | Approve Change Orders                |
| 4.4 | A motion to approve an Independent Contractor Agreement with Heartland School Solutions for a 3-day Mosaic training on site from April 9-11, 2024 at a cost of \$5,397.                                          | Approve Contractor Agmt              |
| 4.5 | A motion to approve an Independent Contractor Agreement with Food 4 Thought, LLC to provide nutrition education for Lindo Park students with Farmer’s Market – Wellness Committee at a cost of \$1,955.          | Approve Contractor Agmt              |
| 4.6 | A motion to approve a contract with GEM Industrial Electric, Inc. for the construction of the new technology department building using 3,150 feet of district-owned portable buildings at a cost of \$2,098,000. | Approve Contract with Gem Industrial |

PUPIL SERVICES

- |     |                                                                                                                                                                         |                           |
|-----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|
| 5.1 | A motion to approve a Settlement Agreement with a district family to establish FAPE, which includes two months tuition reimbursement at a total cost of \$10,212.28.    | Approve Settlement Agrmnt |
| 5.2 | A motion to approve a Settlement Agreement with a district family to cover attorney’s fees and Independent Educational Evaluations (IEE’s) at a total cost of \$11,450. | Approve Settlement Agrmnt |

BOARD POLICIES, ADMINISTRATIVE REGULATIONS AND/OR EXHIBITS

- |     |                                                                                                                              |                      |
|-----|------------------------------------------------------------------------------------------------------------------------------|----------------------|
| 6.1 | A motion to adopt Board Policy, Administrative Regulation and Exhibit 1312.2: Complaints Concerning Instructional Materials. | Adopt BP/AR/E 1312.2 |
| 6.2 | A motion to adopt Board Policy and Administrative Regulation 1312.3: Uniform Complaint Procedures.                           | Adopt BP/AR 1312.3   |
| 6.3 | A motion to adopt Board Policy 3312: Contracts.                                                                              | Adopt BP 3312        |
| 6.4 | A motion to adopt Board Policy and Administrative Regulation 3460: Financial Reports and Accountability.                     | Adopt BP/AR 3460     |
| 6.5 | A motion to adopt Board Policy and Administrative Regulation 4161.1/4361.1: Personal Illness/Injury Leave.                   | Adopt BP/AR 4161.1   |

Motion carried unanimously 4:0:1 (Ayes: Bennett, Ellenson, Hoefler Moir, Kasper; Absent: Hayes).

- |     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                              |
|-----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|
| 4.7 | <u>It was approved by</u> Vice President Hoefler Moir and seconded by Member Ellenson to approve the following gifts to the District: A) \$220 from the California Retired Teachers Association to the LMS Choir program; B) \$500 from Lakeside Woman’s Club, \$2,000 from El Capitan Stadium Association, and \$2,750 from the Lakeside Optimists to LMS FFA program; C) \$2,000 from the El Capitan Stadium Association to the LMS Art program; and \$1,500 to the LMS 8 <sup>th</sup> grade end-of-year activities; D) | Accept Gifts to the District |
|-----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|

Lakeside Union School District  
 Board of Trustees Regular Meeting  
 March 14, 2024

- |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                            |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>I. 4.7 (Continued): \$150 from Kay Duke for LMS 6<sup>th</sup> grade camp scholarships; E) \$1,000 from D &amp; R Automotive, Inc. to Lakeside Farms for Biztown; F) \$2,000 from El Capitan Stadium Association to Lindo Park for a class set of 4<sup>th</sup> grade books; and G) \$2,000 from El Capitan Stadium Association to Lindo Park for Biztown. Motion carried unanimously 4:0:1 (<u>Ayes</u>: Bennett, Ellenson, Hoefler Moir, Kasper; <u>Absent</u>: Hayes).</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <p>Accept Gifts to the District<br/>(Cont'd)</p>                                                                                                                                                                                                           |
| <p>J. 1. There were no comments on the Enrollment Report for Month 6 from January 8 – February 2, 2024.<br/>         2. Legislative updates: None at this time.<br/>         3. <i>First reading</i> of Administrative Regulation 4161.2/4261.2/4361.2: Personal Leaves. This will come back next month for adoption.<br/>         6. <i>First reading</i> of Administrative Regulation 4161.8/4261.8/4361.8: Family Care and Medical Leave. This will come back next month for adoption.<br/>         7. <i>First reading</i> of Board Policy 5131.9: Academic Honesty.<br/>         8. <i>First reading</i> of Administrative Regulation and Exhibit 5145.71: Title IX Sexual Harassment Complaint Procedures.</p>                                                                                                                                                                                                                                                                                                       | <p>Enrollment Report<br/>         Leg Updates AR 4161.2<br/> <br/>         AR 4161.8<br/> <br/>         BP 5131.9<br/>         AR/E 5145.71</p>                                                                                                            |
| <p>K. 1A. Kerry Strong, LTA President, was not present<br/> <br/>         1B. David Myers, CSEA President, was not present.<br/> <br/>         2A. Lisa Davis, Assistant Superintendent, highlighted the Child Nutrition department. They are knee deep in audits right now. Their exit interview found no fiscal findings. The CDE audit is every 5 years. The last of the central kitchen remodel is happening now and is projected to be done on time or before expected. They ordered new trucks that are about 4 weeks out from delivery. The ESS program will hold 2 field trips over Spring Break.<br/> <br/>         2B. Dr. Natalie Winspear, Assistant Superintendent, shared an attendance chart. It shows the awesome news that you get what you pay attention to. Chronic absences are down 31%. The more school days, the more opportunity we have for lower numbers.<br/> <br/>         2C. Dr. Rhonda Taylor, Superintendent, shared her podcast of the amazing women in the Woman’s Club of Lakeside.</p> | <p>LTA President<br/> <br/>         CSEA President<br/> <br/>         Assistant Superintendent<br/>         Lisa Davis<br/> <br/>         Assistant Superintendent<br/>         Dr. Winspear<br/> <br/>         Superintendent<br/>         Dr. Taylor</p> |
| <p>L. Vice President Hoefler Moir asked if there was any further business to come before the board. There being none, the president declared the regular board meeting adjourned at 7:07 p.m.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <p>Adjournment</p>                                                                                                                                                                                                                                         |

Rhonda L. Taylor, Ed.D.  
 Secretary to the Board

Jim Bennett  
 Clerk of the Board

# LAKESIDE UNION SCHOOL DISTRICT

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**Governing Board Meeting Date:** 4/11/24

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**Agenda Item:**

Day of the Teacher Resolution #2024-18

**Background (Describe purpose/rationale of the agenda item):**

Resolution #2024-18, proclaiming Wednesday, May 1, 2024 as Day of the Teacher in the Lakeside Union School District and expressing gratitude for their dedication and the instruction, care and support they provide the students.

**Fiscal Impact (Cost):**

N/A

**Funding Source:**

N/A

**Addresses Emphasis Goal(s):**

**#1:** Academic Achievement       **#2:** Social Emotional       **#3:** Physical Environments

**Recommended Action:**

- |                                                     |                                                                                        |
|-----------------------------------------------------|----------------------------------------------------------------------------------------|
| <input type="checkbox"/> <b>Informational</b>       | <input type="checkbox"/> <b>Denial</b>                                                 |
| <input type="checkbox"/> <b>Discussion</b>          | <input type="checkbox"/> <b>Ratification</b>                                           |
| <input type="checkbox"/> <b>Approval</b>            | <input type="checkbox"/> <b>Explanation:</b> <a href="#">Click here to enter text.</a> |
| <input checked="" type="checkbox"/> <b>Adoption</b> |                                                                                        |

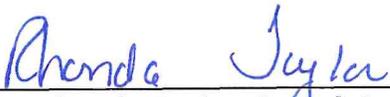
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**Originating Department/School:** Superintendent's Office

**Submitted/Recommended By:**

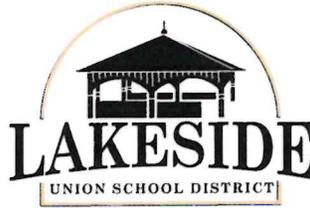
**Approved for Submission to the Governing Board:**

  
\_\_\_\_\_  
Lisa DeRosier, Executive Assistant

  
\_\_\_\_\_  
Dr. Rhonda Taylor, Superintendent

Administration:

RHONDA L. TAYLOR, Ed.D.  
*Superintendent*  
NATALIE WINSPEAR, Ed.D.  
*Assistant Superintendent*  
LISA DAVIS  
*Assistant Superintendent*



Board of Trustees:

JIM BENNETT  
AUTUMN ELLENSON  
ANDREW HAYES  
LARA HOEFER MOIR  
RON KASPER

**DAY OF THE TEACHER  
RESOLUTION NO. 2024-18**

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**WHEREAS**, providing quality education to our students continues to be our greatest challenge in education, as well as our most vital responsibility; and,

**WHEREAS**, we rely largely on school teachers to ensure proper instruction in a variety of subjects; and,

**WHEREAS**, in addition to teaching academics, teachers provide guidance, support and encouragement to their students; and,

**WHEREAS**, it is appropriate that we recognize California's teachers, especially those in our Lakeside schools, and express gratitude for their dedication and the care and concern they have for their students; **NOW, THEREFORE**,

**BE IT RESOLVED** that the Governing Board of the Lakeside Union School District does hereby proclaim Wednesday, *May 1, 2024*, as **DAY OF THE TEACHER** in Lakeside; and

**BE IT FURTHER RESOLVED** that a letter of appreciation be presented to each teacher in the Lakeside Union School District.

**PASSED AND ADOPTED** this 11<sup>th</sup> day of April 2024 by the Board of Trustees of the Lakeside Union School District of San Diego County, California.

\_\_\_\_\_  
*Andrew Hayes, President*

\_\_\_\_\_  
*Lara Hoefler Moir, Vice President*

\_\_\_\_\_  
*Jim Bennett, Clerk*

\_\_\_\_\_  
*Ron Kasper, Member*

\_\_\_\_\_  
*Autumn Ellenson, Member*

\_\_\_\_\_  
*Dr. Rhonda L. Taylor  
Superintendent*

# LAKESIDE UNION SCHOOL DISTRICT

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**Governing Board Meeting Date:** 4/11/24

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**Agenda Item:**

Personnel Assignment Order 2024-11

**Background (Describe purpose/rationale of the agenda item):**

The Personnel Assignment Order reflects new hires, retirements and changes in positions.

**Fiscal Impact (Cost):**

Varies

**Funding Source:**

General Fund

**Addresses Emphasis Goal(s):**

**#1:** Academic Achievement       **#2:** Social Emotional       **#3:** Physical Environments

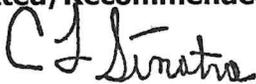
**Recommended Action:**

- |                                                     |                                                                                        |
|-----------------------------------------------------|----------------------------------------------------------------------------------------|
| <input type="checkbox"/> <b>Informational</b>       | <input type="checkbox"/> <b>Denial</b>                                                 |
| <input type="checkbox"/> <b>Discussion</b>          | <input type="checkbox"/> <b>Ratification</b>                                           |
| <input type="checkbox"/> <b>Approval</b>            | <input type="checkbox"/> <b>Explanation:</b> <a href="#">Click here to enter text.</a> |
| <input checked="" type="checkbox"/> <b>Adoption</b> |                                                                                        |

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**Originating Department/School:** Human Resources

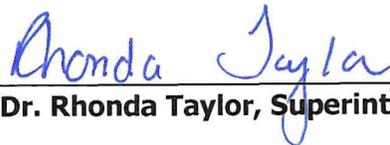
**Submitted/Recommended By:**



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Christine Sinatra, HR Exec Director

**Approved for Submission to the Governing Board:**



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Dr. Rhonda Taylor, Superintendent

**LAKESIDE UNION SCHOOL DISTRICT  
BOARD OF TRUSTEES BOARD MEETING, April 11, 2024  
Personnel Assignment Order – 2024-11**

**BACKGROUND:**

The following personnel appointments, changes of status, leave requests, resignations, dismissals, and consultant requests are submitted for Board consideration. Italicized information indicates a change.

**Certificated Staff**

**A. New Hire:**

Employee	Assignment/Location	Class/Step	Previous Annual Salary	New Annual Salary	Effective Date

**B. Reclassification/Location:**

Employee	Assignment	Effective Date

**C. Waiver:**

Employee	Assignment/Location	Reason	Recommendation	Effective Date

**D. Resignation:**

Employee	Assignment/Location	Class/Step	Reason	Effective Date

**E. Provisional Internship Permit:**

Employee	Assignment/Location	Effective Date

**F. LAO:**

Employee	Location	Position	Reason	Effective Date

**G. Reduced Workload Program:**

Employee	Location	Position	Effective Date	Recommendation
Suzanne Smith	District Office	TOSA	8/14/2024	Yes

## Classified Staff

### H. New Hire:

Employee	Location	Position/Class/Step	Previous Monthly Salary	New Monthly Salary	Effective Date
Carter, Marlene	Child Nutrition	Child Nutrition Assit/8/2	N/A	\$671.31	4/8/2024
Caruso, Daniel	Transportation	Trans Student Attendant/10/2	N/A	\$1,377.00	4/8/2024

### I. Change of Status/Location:

Employee	Location	Position/Class/Step	Previous Monthly Salary	New Monthly Salary	Effective Date

### J. Management Position:

Employee	Location	Position/Range/Step	Effective Date

### K. Resignation/Termination:

Employee	Location	Position	Reason	Effective Date
Baker, Ashley	ESS	Child Dev Assistant	N/A	1-20-2024
Burnham, Christine	LEAPP	IA-II-SPED	Retire	3/23/2024
Cooley, Evangeline	Child Nutrition	Child Nutrition Assistant	N/A	3/22/2024
Lamb, Savannah	ESS	Child Dev Assistant	N/A	3/22/2024
Lima, Linda	LEAP	IA-III-Sped	Retirement	5-1-2024
Schoonover, Karina	Lemon Crest	IA-III-SPED	N/A	3/22/2024

### L. Leave:

Employee Name	Location	Position	Effective Date

### M. Short Term Staff Agreement

Employee	Title	Start/End Date	Job Duties	Hourly Rate
Lobaugh, Elyse	ELPAC Tester	2/20/2024-4/18/2024	Perform in the role of ELPAC Test Examiner (ELPAC TE) to administer the English Language Proficiency Assessments for California (ELPAC). TEs will administer tests to English Learner students in grades TK-12 using an online testing platform called TOMS (Test Operations Management System).	\$18.31

**RECOMMENDATION:**

Administration recommends approval of listed personnel appointments, changes of status, leave requests, resignations, dismissals, and consultants. This recommendation supports the following District goal: Assure the highest quality of school district services, including, but not limited to, academic, social, emotional and health services by hiring and retaining employees with not only required technical skills in the areas of their responsibilities but also the ability to handle diverse challenges.

# LAKESIDE UNION SCHOOL DISTRICT

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**Governing Board Meeting Date:** 4/11/24

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**Agenda Item:**

Resolution No. 2024-19

**Background (Describe purpose/rationale of the agenda item):**

Resolution No. 2024-19 Reducing or Discontinuing Particular Kinds of Services for the 2024-2025 School Year Implementing Education Code Sections 45114, 45117, 45298, and 45308.

**Fiscal Impact (Cost):**

[Click here to enter text.](#)

**Funding Source:**

N/A

**Recommended Action:**

- |                                              |                                                                                 |
|----------------------------------------------|---------------------------------------------------------------------------------|
| <input type="checkbox"/> Informational       | <input type="checkbox"/> Denial                                                 |
| <input type="checkbox"/> Discussion          | <input type="checkbox"/> Ratification                                           |
| <input type="checkbox"/> Approval            | <input type="checkbox"/> Explanation: <a href="#">Click here to enter text.</a> |
| <input checked="" type="checkbox"/> Adoption |                                                                                 |

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**Originating Department/School:** Human Resources

**Submitted/Recommended By:**

**Approved for Submission to the Governing Board:**



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Christine Sinatra, HR Exec Director



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Dr. Rhonda Taylor, Superintendent

**BEFORE THE BOARD OF TRUSTEES OF THE  
LAKESIDE UNION SCHOOL DISTRICT  
SAN DIEGO COUNTY, CALIFORNIA**

April 11, 2024

Resolution Reducing or Discontinuing Particular )  
Kinds of Services for the 2024-25 School Year )  
and Authorizing Final Layoff Notices to )  
Implement Education Code Sections 45114, 45117, )  
45298, and 45308 )

**WHEREAS**, Education Code sections 45114, 45117, 45298, and 45308 authorize the Lakeside Union School District (hereafter, the “District”) to layoff classified employees for lack of work and/or lack of funds; and

**WHEREAS**, on February 15, 2024, the Governing Board of the District adopted Resolution No. 2024-15 to reduce or discontinue particular kinds of services and permit the layoff of classified employees by no later than the end of the 2023-2024 school year, as described and set forth in that Resolution; and

**WHEREAS**, after the Governing Board adopted Resolution No. 2024-15, and on or before March 15, 2024, the Superintendent’s designated representatives served notice on the classified employees that it has been recommended that their services will not be required for the 2024-2025 school year pursuant to Education Code sections 45117 and 45308 (referred to herein as a “preliminary layoff notices”); and

**WHEREAS**, the preliminary layoff notices advised those recipients eligible to request a hearing pursuant to Education Code section 45117, that they could request a hearing to determine if there was cause for not reemploying him or her for the 2024-2025 school year, and that failure to timely request a hearing shall constitute a waiver of the right to a hearing and their services will accordingly be terminated pursuant to the recommendation, without a hearing; and

**WHEREAS**, the recipients did not request a hearing within the time allowed to determine if there is cause for not reemploying them for the ensuing school year, and, therefore, waived any rights to a hearing, and the jurisdictional and statutory prerequisites have been satisfied as to all such employees as required by law; and

**WHEREAS**, Education Code section 45117, subdivision (c), provides that the Governing Board shall make the final determination as to the sufficiency of the cause and disposition of the layoff; and

**WHEREAS**, Education Code section 45117, subdivision (c), requires final Board action and notifications to employees no later than May 15, 2024; and

**WHEREAS**, the services of no permanent or other classified employee are being terminated while any probationary or other classified employee with less seniority is being retained to render a service which the permanent or other employee is competent to render, within the meaning of, and except as permitted by, Education Code section 45308; and

**WHEREAS**, sufficient cause exists for the termination of the identified classified positions, and pursuant to and within the meaning of Education Code section 45117, said cause relates to the welfare of the schools and the pupils thereof; and

**WHEREAS**, rights to reemployment pursuant to Education Code section 45117 and/or 45308 shall be provided to the qualifying classified employees whose services are terminated as a result of this layoff.

**NOW THEREFORE, BE IT RESOLVED**, that sufficient cause exists to reduce or discontinue the following services of the District no later than the beginning of the 2024-2025 school year:

Seven (7) Art/Music Instructional Assistant	Discontinued	0.475 FTE (Categorical)
Two (2) Playground Coordinator	Discontinued	0.427 FTE (Categorical)
Two (2) Instructional Assistant III - SPED	Reduced	0.3 FTE
One (1) Instructional Assistant III - SPED	Reduced	0.15 FTE
Two (2) Instructional Assistant II - SPED	Reduced	0.14838 FTE

**NOW, THEREFORE, BE IT RESOLVED**, that the above-mentioned services in the District shall be reduced or discontinued to the extent herein above described effective upon the close of this school year, i.e., the end of the last working day prior to July 1, 2024;

**BE IT FURTHER RESOLVED**, that this decision is effective immediately and that the Superintendent or her designee may take such actions as are necessary and appropriate to implement the Board's decision, including at least giving proper notice to the impacted classified employees of termination because of lack of work and/or lack of funds to take effect upon the close of the school year, with these notices being given on or before May 15, 2024, in the manner prescribed in Education Code section 45117;

**BE IT FURTHER RESOLVED**, that reemployment rights be afforded in accordance with the Education Code and Article 28, Layoff and Reemployment, of the 2022-2025 Collective Bargaining Agreement between the Lakeside Union School District Board of Trustees and the California School Employees Association and its Lakeside Chapter 240, if and when reemployment is offered and to the extent any reemployment rights are applicable to any of the impacted employees.

**PASSED AND ADOPTED**, this 11th day of April, 2024, by the Governing Board of the **LAKESIDE UNION SCHOOL DISTRICT** of San Diego, California, by the following vote:

AYES:

NOS:

ABSTAIN:

ABSENT:

Dated this \_\_ day of April, 2024.

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Clerk of the Governing Board  
of the **LAKESIDE UNION SCHOOL DISTRICT** of  
San Diego County, State of California

# LAKESIDE UNION SCHOOL DISTRICT

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**Governing Board Meeting Date:** APRIL 11, 2024

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**Agenda Item:**

COMMERCIAL WARRANT LISTING SHEET – for the period 03/01/2024 – 03/31/2024

**Background (Describe purpose/rationale of the agenda item):**

This is a required monthly report - per Board Policy #3300, "the Governing Board shall review all warrants issued by the district at their monthly Board meeting".

**Fiscal Impact (Cost):**

\$ 1,411,474.55

**Funding Source:**

General, ASB, Child Development, Child Nutrition, Bond, & Charter Schools (Barona, RVCS)

**Addresses Emphasis Goal(s):**

**#1:** Academic Achievement       **#2:** Social Emotional       **#3:** Physical Environments

**Recommended Action:**

- |                                                     |                                                                                        |
|-----------------------------------------------------|----------------------------------------------------------------------------------------|
| <input type="checkbox"/> <b>Informational</b>       | <input type="checkbox"/> <b>Denial/Rejection</b>                                       |
| <input type="checkbox"/> <b>Discussion</b>          | <input type="checkbox"/> <b>Ratification</b>                                           |
| <input checked="" type="checkbox"/> <b>Approval</b> | <input type="checkbox"/> <b>Explanation:</b> <a href="#">Click here to enter text.</a> |
| <input type="checkbox"/> <b>Adoption</b>            |                                                                                        |

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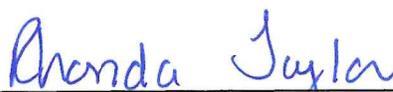
**Originating Department/School:** Business Services

**Submitted/Recommended By:**



**Lisa Davis, Assistant Superintendent**

**Approved for Submission to the Governing Board:**



**Dr. Rhonda Taylor, Superintendent**

**Reviewed by Cabinet Member** \_\_\_\_\_

BOARD WARRANT REPORT 3/01/2024 - 3/31/2024

Fund	Warrant ID	Vendor Name	Payment Date	Invoice Item Description	Amount Charged to Fund
0100	020564	AMERICAN FIDELITY ADMIN. SERVICES, LLC	3/25/2024	ACA Reporting Services	2,384.40
0100	14122790	AMAZON CAPITAL SERVICES, INC.	3/4/2024	SUPPLIES	7,296.85
0100	14122792	AZUMA TECH SYSTEMS INC.	3/4/2024	M&O Services	1,970.00
0100	14122794	BOYS TO MEN MENTORING	3/4/2024	MENTORING SERVICE	5,000.00
0100	14122795	CROSS COUNTRY STAFFING, INC	3/4/2024	SPED SERVICES	13,973.25
0100	14122796	CPI	3/4/2024	CPI NONVIOLENT CRISIS INTERVEN	2,961.40
0100	14122797	CAL PACIFIC TRUCK CENTER, LLC	3/4/2024	TRANS Service/Repair	139.03
0100	14122798	THE EAST COUNTY CALIFORNIAN	3/4/2024	2024 RFP COPIER ADVERTISEMENT,	161.00
0100	14122799	ELEVATOR PROFESSIONALS INC.	3/4/2024	M&O Services	520.00
0100	14122800	REECE PLUMBING	3/4/2024	Maintenance Supplies	1,071.18
0100	14122801	EYE PHONE CITY	3/4/2024	TECH Inst Service/Repair (0000	1,626.95
0100	14122803	SAFETY-KLEEN SYSTEMS, INC.	3/4/2024	TRANS Service	783.06
0100	14122804	SAN DIEGO COUNTY OFFICE OF ED	3/4/2024	CONFERENCE	650.00
0100	14122805	SCHOOL SERVICES OF CA, INC	3/4/2024	GOVERNOR'S BUDGET WORKSHOP, LI	650.00
0100	14122807	STS EDUCATION	3/4/2024	ENVIRONMENTAL FEE	1,340.10
0100	14122808	T-MOBILE	3/4/2024	District HotSpots	1,640.00
0100	14122809	JEWELL ENTERPRISES SD LLC	3/4/2024	Printing Services	52.80
0100	14122810	BORDER RECAPPING, LLC	3/4/2024	M&O Services	313.26
0100	14122811	WAXIE SANITARY SUPPLY	3/4/2024	Custodial Supplies	10,630.67
0100	14124151	AMPLIFY EDUCATION, INC.	3/7/2024	AMPLIFIED SCIENCE TRANSITIONAL	539.43
0100	14124152	ASCEND SERVICES, INC.	3/7/2024	SPED SERVICES	29,379.28
0100	14124153	ASELTINE SCHOOL	3/7/2024	TUITION	20,835.52
0100	14124154	BENJAMIN IRA THOMAS-STEVENS	3/7/2024	INDUCTION	1,000.00
0100	14124155	CHULA VISTA ELECTRIC CO	3/7/2024	LABOR TO REPLACE FALLEN ELECTR	49,058.75
0100	14124158	COOPERATIVE STRATEGIES LLC	3/7/2024	Reimbursable Expenses	3,257.70
0100	14124161	DEBRA DUPREE	3/7/2024	IEP SERVICES	600.00
0100	14124162	DION & SONS, INC.	3/7/2024	M&O Fuel Charges	3,994.75
0100	14124168	Janelle C. Hensley	3/7/2024	Agreement	620.00
0100	14124169	JORDONA L. TRAVIS	3/7/2024	SPED SERVICES	560.00
0100	14124171	KYOCERA DOCUMENT SOLUTIONS WEST, LLC	3/7/2024	COPIER LEASE AND COPIES	794.74
0100	14124173	LEADER SERVICES	3/7/2024	SPED Medi-Cal Reporting	20,059.43
0100	14124174	OFFICE DEPOT, INC.	3/7/2024	SUPPLIES	59.84
0100	14124176	NCS PEARSON, INC	3/7/2024	SPED SUPPLIES	662.99
0100	14124177	QUALITY LIFT TRUCKS	3/7/2024	FORK LIFTS	74,157.32
0100	14124178	RAYNE OF SAN DIEGO	3/7/2024	WATER SERVICE	38.00
0100	14124180	SAN DIEGO COUNTY OFFICE OF ED	3/7/2024	5D FRAMEWORK	15,000.00

BOARD WARRANT REPORT 3/01/2024 - 3/31/2024

Fund	Warrant ID	Vendor Name	Payment Date	Invoice Item Description	Amount Charged to Fund
0100	14124181	SHRED IT	3/7/2024	LC Lottery Admin	144.14
0100	14124182	SLOAN PLUMBING SERVICES INC	3/7/2024	REPAIR GAS LEAK AT LV	1,300.00
0100	14124183	SMART & FINAL: ACCT #398869	3/7/2024	SUPPLIES	622.61
0100	14124184	SOLIANT HEALTH LLC	3/7/2024	SPED SERVICES	1,392.00
0100	14124185	SOUTHWEST SCHOOL & OFFICE SUPPLY	3/7/2024	SUPPLIES	1,350.22
0100	14124186	SPECIALIZED THERAPY SERVICES	3/7/2024	SPED SERVICES	1,794.15
0100	14124187	LOEWY ENTERPRISES/SUNRISE PRODUCE CO	3/7/2024	CN Produce	16,203.36
0100	14124190	THE STEPPING STONES GROUP, LLC	3/7/2024	SPED SERVICES	1,969.39
0100	14124192	WELLS FARGO VENDOR FINANCIAL SERVICES	3/7/2024	COPIER LEASE AND COPIES	601.17
0100	14125866	AGRICULTURAL PEST CONTROL	3/11/2024	M&O Parts/Supplies	730.00
0100	14125867	ALBERTSONS	3/11/2024	SUPPLIES	287.89
0100	14125869	CRISP ENTERPRISES, INC./CRISP IMAGING	3/11/2024	PRINTING	526.35
0100	14125870	EL CAJON FORD	3/11/2024	M&O Parts/Supplies	353.66
0100	14125872	DAVIS CONSULTING CORPORATION	3/11/2024	CONSULTING SERVICES	1,578.00
0100	14125873	O'REILLY AUTO PARTS	3/11/2024	SUPPLIES	1,977.11
0100	14125876	RAYO WHOLESALE	3/11/2024	Maintenance Supplies	128.01
0100	14125877	SHIFFLER EQUIPMENT SALES INC	3/11/2024	Maintenance Supplies	536.76
0100	14125878	TEACHER CREATED RESOURCES	3/11/2024	SUPPLIES	254.20
0100	14125879	WAXIE SANITARY SUPPLY	3/11/2024	Custodial Supplies	708.93
0100	14125880	WEISSMAN'S	3/11/2024	DANCE COSTUMES	774.64
0100	14127237	Kip Lynn Frazer	3/14/2024	SUPPLY REIMBURSEMENT	31.49
0100	14127240	MATH TRANSFORMATIONS	3/14/2024	Curriculum Roadmap Development	77,500.00
0100	14127241	SUZANNE BASS	3/14/2024	REIMBURSEMENT	94.95
0100	14127242	CATHERINE ANDREWS	3/14/2024	SUPPLY REIMBURSEMENT	189.88
0100	14127245	LEONARD CORREIA	3/14/2024	SUPPLY REIMBURSEMENT	75.47
0100	14127246	CRISP ENTERPRISES, INC./CRISP IMAGING	3/14/2024	PRINTING	344.80
0100	14127247	CURRIER & HUDSON	3/14/2024	LEGAL FEES	23,283.65
0100	14127248	DAVE BANG ASSOCIATES INC OF CA	3/14/2024	EQUIPMENT	7,719.21
0100	14127250	MICHAEL DAWSON	3/14/2024	SUPPLY REIMBURSEMENT	75.36
0100	14127251	DELOITTE SERVICES LP	3/14/2024	COURAGEOUS PRINCIPALS	3,000.00
0100	14127252	FONDA TRIPP	3/14/2024	CSHA DUES	180.00
0100	14127253	HAWTHORNE RENT-IT SERVICE	3/14/2024	M&O Equipment Rentals	617.87
0100	14127254	DAYNAH HOOPER-ROBLEDO	3/14/2024	SUPPLY REIMBURSEMENT	55.40
0100	14127255	DAVINEE HUDEN	3/14/2024	SUPPLY REIMBURSEMENT	20.52
0100	14127256	JASON JUSTESON	3/14/2024	MUSIC REIMBURSEMENT	49.55
0100	14127257	KYOCERA DOCUMENT SOLUTIONS WEST, LLC	3/14/2024	COPIER LEASE AND COPIES	1,153.74

BOARD WARRANT REPORT 3/01/2024 - 3/31/2024

Fund	Warrant ID	Vendor Name	Payment Date	Invoice Item Description	Amount Charged to Fund
0100	14127258	AUDREY LENT	3/14/2024	SUPPLY REIMBURSEMENT	517.11
0100	14127260	CLIFFORD MULL	3/14/2024	SUPPLY REIMBURSEMENT	67.98
0100	14127261	OFFICE DEPOT, INC.	3/14/2024	SUPPLIES	57.37
0100	14127262	ALEXIS ROGERS	3/14/2024	SUPPLY REIMBURSEMENT	46.63
0100	14127263	SAN DIEGO COUNTY OFFICE OF ED	3/14/2024	TRAINING FOR 30 STAFF MEMBERS	3,750.00
0100	14127264	SCHOOL MATE	3/14/2024	SUPPLIES	484.89
0100	14127266	JENNIFER SPEEDIE	3/14/2024	REIMBURSEMENT	272.00
0100	14127269	CHERISE TURNER	3/14/2024	SUPPLY REIMBURSEMENT	142.92
0100	14127271	WELLS FARGO VENDOR FINANCIAL SERVICES	3/14/2024	COPIER LEASE AND COPIES	300.42
0100	14127272	MICHELLE WILLIAMS	3/14/2024	REIMBURSEMENT	109.00
0100	14128748	AAA WATER TENDER	3/18/2024	MO PARTS	280.38
0100	14128749	ALBERTSONS	3/18/2024	SUPPLY REIMBURSEMENT	410.50
0100	14128750	ALLIANCE FOR AFRICAN ASSISTANCE	3/18/2024	TRANSLATION SERVICES	3,238.97
0100	14128751	ALPHA STUDIO DESIGN GROUP	3/18/2024	ARCHITECT FEES	6,040.00
0100	14128752	AT&T	3/18/2024	PHONE SERVICE	3,057.91
0100	14128753	A-Z BUS SALES INC.	3/18/2024	TRANS SUPPLIES	270.67
0100	14128756	DATEL SYSTEMS INCORPORATED	3/18/2024	TECH	220.89
0100	14128758	EL CAJON FORD	3/18/2024	2024 F550 BOX TRUCK 1FDUF5GN8R	95,380.30
0100	14128759	REECE PLUMBING	3/18/2024	Maintenance Supplies	1,492.07
0100	14128763	J.W. PEPPER & SON, INC.	3/18/2024	SUPPLIES	99.15
0100	14128764	LAKESIDE CHAMBER OF COMMERCE	3/18/2024	ADVERTISING	500.00
0100	14128765	LAKESIDE WATER DISTRICT	3/18/2024	WATER SERVICE	889.05
0100	14128766	McGRAW-HILL SCHOOL EDUCATION HOLDINGS	3/18/2024	CURRICULUM	1,315.24
0100	14128767	MISSION IMPRINTABLES, INC	3/18/2024	PRINTING	1,909.79
0100	14128768	OFFICE DEPOT, INC.	3/18/2024	SUPPLIES	53.69
0100	14128769	O'REILLY AUTO PARTS	3/18/2024	SUPPLIES	624.95
0100	14128770	RAYNE OF SAN DIEGO	3/18/2024	WATER SERVICE	76.00
0100	14128771	ARMANDO FLORES/ROYAL LINES CHARTER,LLC	3/18/2024	BUS CHARTER	2,365.00
0100	14128772	SAN DIEGO COUNTY OFFICE OF ED	3/18/2024	EQUITY CONFERENCE	425.00
0100	14128773	SAN DIEGO GAS & ELECTRIC	3/18/2024	GAS AND ELECTRIC	34,693.05
0100	14128774	SCHOOL SPECIALTY, INC	3/18/2024	SCHOOL SUPPLIES	285.04
0100	14128775	SEA WORLD OF CALIFORNIA	3/18/2024	FIELD TRIP	1,208.00
0100	14128776	SCHOOLHOUSE CONNECTION	3/18/2024	CA HOMELESS EDUCATION CONFEREN	2,825.00
0100	14128777	Jacqueline Siragusa	3/18/2024	REIMBURSEMENT	453.53
0100	14128778	SMART & FINAL: ACCT #398869	3/18/2024	SUPPLIES	1,273.95
0100	14128781	HOWARD TARAS, M.D.	3/18/2024	PHYSICIAN CONSULT	70.00

BOARD WARRANT REPORT 3/01/2024 - 3/31/2024

Fund	Warrant ID	Vendor Name	Payment Date	Invoice Item Description	Amount Charged to Fund
0100	14128782	VEBA	3/18/2024	COBRA MEDICAL	3,166.00
0100	14128783	VERIZON WIRELESS	3/18/2024	CELL SERVICE	1,708.54
0100	14128784	WAXIE SANITARY SUPPLY	3/18/2024	Custodial Supplies	1,280.91
0100	14128785	WEBB'S RV SUPPLY	3/18/2024	Maintenance Supplies	25.75
0100	14128786	WELLS FARGO VENDOR FINANCIAL SERVICES	3/18/2024	COPIER LEASE AND COPIES	106.82
0100	14128787	WESTERN ENVIRONMENTAL & SAFETY	3/18/2024	INSPECTION	1,145.00
0100	14129842	ATKINSON, ANDELSON, LOYA, RUUD AND ROMO	3/21/2024	LEGAL FEES	962.50
0100	14129843	AAA WATER TENDER	3/21/2024	M&O Parts/Supplies	160.59
0100	14129844	ALLIED REFRIGERATION INC	3/21/2024	M&O Parts/Supplies	482.98
0100	14129845	ALLIANCE FOR AFRICAN ASSISTANCE	3/21/2024	TRANSLATION SERVICES	786.25
0100	14129846	ALPHA STUDIO DESIGN GROUP	3/21/2024	ARCHITECT FEES	13,368.50
0100	14129847	AZUMA TECH SYSTEMS INC.	3/21/2024	M&O Services	620.00
0100	14129850	CINTAS CORPORATION	3/21/2024	Custodial Services	914.17
0100	14129852	dba CONNECT4KIDS PSYCHOLOGICAL SERVICES,	3/21/2024	ADDENDUM TO CONTRACT TO CONTIN	2,640.00
0100	14129854	Day Management Corp./Day Wireless System	3/21/2024	RADIO REPAIR	2,715.97
0100	14129855	DEPARTMENT OF JUSTICE	3/21/2024	HR Fingerprinting	260.00
0100	14129856	DIDAX, INC.	3/21/2024	SPED SUPPLIES	160.71
0100	14129857	CAL PACIFIC TRUCK CENTER, LLC	3/21/2024	TRANSService/Repair	91.99
0100	14129858	DION & SONS, INC.	3/21/2024	FUEL CHARGES	5,108.77
0100	14129859	3 CHORDS/EPIC SPECIAL EDUCATION STAFFING	3/21/2024	SPED SERVICES	12,815.00
0100	14129860	dba ECA SCIENCE KIT SERVICES	3/21/2024	CLASSROOM SUPPLIES	13,171.68
0100	14129861	REECE PLUMBING	3/21/2024	Maintenance Supplies	147.89
0100	14129862	FAIN DRILLING & PUMP CO., INC	3/21/2024	LABOR TO REPLACE CONTROLLER	20,562.37
0100	14129863	FERGUSON ENTERPRISES, INC	3/21/2024	M&O Parts/Supplies	144.84
0100	14129864	FIRST STUDENT INC.	3/21/2024	SPED Transportation Services	4,990.00
0100	14129865	MICHELLE FURMAN, M.S., P.T	3/21/2024	Physical Therapy Services	4,255.00
0100	14129866	INSTITUTE FOR EFFECTIVE EDUCATION	3/21/2024	TUITION	11,189.56
0100	14129867	JOSTENS	3/21/2024	YEARBOOKS	4,111.92
0100	14129868	KYOCERA DOCUMENT SOLUTIONS WEST, LLC	3/21/2024	COPIER LEASE AND COPIES	466.48
0100	14129870	LAKESIDE EQUIPMENT	3/21/2024	M&O Equipment Rentals	1,071.55
0100	14129871	McGRAW-HILL SCHOOL EDUCATION HOLDINGS	3/21/2024	CURRICULUM	9,122.65
0100	14129872	MISSION FEDERAL CREDIT UNION	3/21/2024	PCARD	15,505.72
0100	14129873	MARIANA MESNIK	3/21/2024	SPED SERVICES	6,792.50
0100	14129874	N2Y, INC/UNIQUE LEARNING SYS.	3/21/2024	SPED SUPPLIES	53.34
0100	14129875	NEW HAVEN YOUTH AND FAMILY SERVICES	3/21/2024	SPED SERVICES	2,200.00
0100	14129876	OFFICE DEPOT, INC.	3/21/2024	PAPER SUPPLIES	3,243.43

BOARD WARRANT REPORT 3/01/2024 - 3/31/2024

Fund	Warrant ID	Vendor Name	Payment Date	Invoice Item Description	Amount Charged to Fund
0100	14129877	NCS PEARSON, INC	3/21/2024	SPED SUPPLIES	795.81
0100	14129878	PECK'S HEAVY FRICTION INC	3/21/2024	TRANS SUPPLIES	1,050.00
0100	14129881	RAYNE OF SAN DIEGO	3/21/2024	WATER SERVICE	35.00
0100	14129882	LAKESIDE UNION SCHOOL DISTRICT	3/21/2024	REVOLVING CASH	10,191.15
0100	14129883	ARMANDO FLORES/ROYAL LINES CHARTER,LLC	3/21/2024	BUS CHARTER	1,255.00
0100	14129884	SAN DIEGO COUNTY OFFICE OF ED	3/21/2024	COMMAND SYSTEM TRAINING ZOOM 1	60.00
0100	14129885	SAN DIEGO GAS & ELECTRIC	3/21/2024	GAS AND ELECTRIC	1,200.60
0100	14129886	SPECIALIZED EDUCATION OF CALIFORNIA, INC	3/21/2024	SPED SERVICES	6,795.64
0100	14129887	SKY ZONE CHULA VISTA	3/21/2024	ADMISSION TO SKYZONE AMUSEMENT	1,450.00
0100	14129888	SMIRTHWAITE USA LLC	3/21/2024	SPED SUPPLIES	562.00
0100	14129889	SOLIANT HEALTH LLC	3/21/2024	SPED SERVICES	4,366.25
0100	14129890	SOUTHWEST SCHOOL & OFFICE SUPPLY	3/21/2024	SUPPLIES	385.03
0100	14129891	VERBAL BEHAVIOR ASSOCIATES, INC.	3/21/2024	SPED SERVICES	11,748.43
0100	14129892	WAXIE SANITARY SUPPLY	3/21/2024	Custodial Supplies	1,786.65
0100	14129893	WELLS FARGO VENDOR FINANCIAL SERVICES	3/21/2024	COPIER LEASE AND COPIES	1,054.30
0100	14129894	WPS	3/21/2024	SPED SUPPLIES	111.41
0100	14129895	WESTERN SIGN & AWNING, INC.	3/21/2024	MARQUEE	16,963.20
0100	14131519	ATKINSON, ANDELSON, LOYA, RUUD AND ROMO	3/25/2024	ADMINISTRATORS GUIDE TO INVEST	219.00
0100	14131520	AAA WATER TENDER	3/25/2024	M&O Parts/Supplies	62.28
0100	14131522	AMAZON CAPITAL SERVICES, INC.	3/25/2024	SUPPLIES	13,819.02
0100	14131525	AZUMA TECH SYSTEMS INC.	3/25/2024	M&O Services	1,443.00
0100	14131526	CURRIER & HUDSON	3/25/2024	LEGAL FEES	31,125.00
0100	14131527	EAST PENN MFG CO	3/25/2024	TRAN SUPPLIES	590.90
0100	14131528	REECE PLUMBING	3/25/2024	Maintenance Supplies	559.77
0100	14131529	HOME DEPOT CREDIT SERVICES	3/25/2024	SUPPLIES	6,670.09
0100	14131530	LAKESHORE LEARNING MATERIALS	3/25/2024	SUPPLIES	568.64
0100	14131531	ARMANDO FLORES ROYAL LINES CHARTER,LLC	3/25/2024	BUS CHARTER	3,860.00
0100	14131532	ROBOSOURCE, LLC	3/25/2024	ROBOTICS SUPPLIES	4,135.65
0100	14131533	SAN DIEGO COUNTY OFFICE OF ED	3/25/2024	ACTIVE SHOOTER TRAINING	130.00
0100	14131534	SITEONE LANDSCAPE SUPPLY HOLDING, LLC	3/25/2024	Maintenance Supplies	444.66
0100	14131535	SOUTHWEST SCHOOL & OFFICE SUPPLY	3/25/2024	SUPPLIES	42.13
0100	14131536	VALLEY INDUSTRIAL SPECIALTIES, INC.	3/25/2024	Maintenance Supplies	378.87
0100	14131537	WESTERN ENVIRONMENTAL & SAFETY	3/25/2024	Sampling Asbestos Inspection	1,135.00
0100	14132648	Jennifer Lynn Chandler	3/28/2024	CONFERENCE	204.29
0100	14132650	AAA WATER TENDER	3/28/2024	M&O Parts/Supplies	264.84
0100	14132651	LANGUAGE TESTING INTERNATIONAL, INC.	3/28/2024	AAPPL IMMERSION ASSESSMENTNO	335.00

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Fund	Warrant ID	Vendor Name	Payment Date	Invoice Item Description	Amount Charged to Fund
0100	14132652	ALBERTSONS	3/28/2024	SUPPLIES	519.53
0100	14132653	Brett Allen dba ALLEN ESQ	3/28/2024	ATTORNEY FEES	7,000.00
0100	14132654	AMAZON CAPITAL SERVICES, INC.	3/28/2024	SUPPLIES	3,233.95
0100	14132656	AMERICAN PRODUCE DISTRIBUTORS	3/28/2024	CN Produce	14,673.77
0100	14132657	ASCEND SERVICES, INC.	3/28/2024	SPED SERVICES	30,196.00
0100	14132658	YARISEL BLUMKA	3/28/2024	CONFERENCE	312.52
0100	14132659	BROOKE DEXHEIMER	3/28/2024	REIMBURSEMENT	376.52
0100	14132660	LUCRETIA BROWNING	3/28/2024	REIMBURSEMENT	30.97
0100	14132662	CAMEO PAPER & JANITORIAL	3/28/2024	Custodial Supplies	575.50
0100	14132663	CINTAS CORPORATION	3/28/2024	MOT SERVICES	845.16
0100	14132665	RON COOK	3/28/2024	VIDEO PRODUCTION	750.00
0100	14132666	COX COMMUNICATIONS	3/28/2024	NETWORKING SERVICES	1,587.97
0100	14132667	DAVE & BUSTERS of CALIFORNIA, Inc.	3/28/2024	ESS CAMP	6,785.11
0100	14132668	DATEL SYSTEMS INCORPORATED	3/28/2024	TECH	3,575.15
0100	14132669	DEBRA DUPREE	3/28/2024	CONSULTING SERVICES	1,200.00
0100	14132670	LISA DEROSIER	3/28/2024	REIMBURSEMENT	45.97
0100	14132671	EDCO DISPOSAL CORPORATION	3/28/2024	GARBAGE AND RECYCLING	7,706.58
0100	14132672	ELIZABETH UPCHURCH	3/28/2024	REIMBURSEMENT	110.29
0100	14132674	REECE PLUMBING	3/28/2024	Maintenance Supplies	49.56
0100	14132675	F3 Entertainment LLC	3/28/2024	NINJA FACTORY ADMISSION FOR SP	1,200.00
0100	14132677	FERGUSON ENTERPRISES, INC	3/28/2024	M&O Parts/Supplies	182.14
0100	14132678	FUNDRAISING MANAGER	3/28/2024	FUNDRAISER PRODUCTS	901.60
0100	14132679	Nicole Genet	3/28/2024	CONFERENCE	138.00
0100	14132680	HAWTHORNE RENT-IT SERVICE	3/28/2024	M&O Equipment Rentals	1,000.08
0100	14132681	HELIX WATER DISTRICT	3/28/2024	WATER SERVICES	1,894.67
0100	14132682	IMAGINE LEARNING, LLC	3/28/2024	EL EDUCATION STUDENT MODULES &	89,077.68
0100	14132684	JASON JUSTESON	3/28/2024	REIMBURSEMENT	165.58
0100	14132685	J.W. PEPPER & SON, INC.	3/28/2024	ARABIAN DANCE	67.50
0100	14132688	KARI KOCH	3/28/2024	REIMBURSEMENT	41.75
0100	14132689	KYOCERA DOCUMENT SOLUTIONS WEST, LLC	3/28/2024	COPIER LEASE AND COPIES	397.06
0100	14132690	LAKESIDE WATER DISTRICT	3/28/2024	WATER	289.83
0100	14132691	MELISSA MANN	3/28/2024	CONFERENCE	617.80
0100	14132691	MELISSA MANN	3/28/2024	DUES REIMBURSEMENT	433.00
0100	14132692	KATHRYN MARTIN	3/28/2024	REIMBURSEMENT	87.17
0100	14132693	MISSION IMPRINTABLES, INC	3/28/2024	PRINTING	1,310.13
0100	14132696	NUTRIEN AG SOLUTION	3/28/2024	Maintenance Supplies	1,499.88

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Fund	Warrant ID	Vendor Name	Payment Date	Invoice Item Description	Amount Charged to Fund
0100	14132698	QUADIENT LEASING USA, INC.	3/28/2024	DO Mail Machine Lease	1,152.73
0100	14132699	NEXT DAY PRINTED TEES	3/28/2024	PE Supplies	1,185.35
0100	14132700	OFFICE DEPOT, INC.	3/28/2024	SUPPLIES	54.73
0100	14132701	PARKWAY BOWL	3/28/2024	ESS CAMP	3,368.75
0100	14132703	PLAY CITY AMUSEMENT CENTER LLC	3/28/2024	ADMISSION FOR FIELD TRIP INCLU	1,050.00
0100	14132704	LAKESIDE UNION SCHOOL DISTRICT	3/28/2024	REVOLVING CASH	833.94
0100	14132705	SAN DIEGO COUNTY OFFICE OF ED	3/28/2024	TRAINING	140.00
0100	14132706	SCHOLASTIC INC	3/28/2024	BOOK ORDERS	3,900.73
0100	14132707	SCHOOL SERVICES OF CA, INC	3/28/2024	SABRE REPORTS	350.00
0100	14132708	SCHOOL FACILITY CONSULTANTS	3/28/2024	Modernization Consultant	496.25
0100	14132709	SHARON SULLINGER	3/28/2024	REIMBURSEMENT	116.88
0100	14132710	SMART & FINAL: ACCT #398869	3/28/2024	SUPPLIES	209.89
0100	14132711	SOLIANT HEALTH LLC	3/28/2024	SPED SERVICES	1,566.00
0100	14132712	SPARKLETTS	3/28/2024	WATER SERVICE	478.07
0100	14132714	TELACU CONSTRUCTION MANAGEMENT, INC	3/28/2024	CONSTRUCTION	27,136.00
0100	14132715	JEWELL ENTERPRISES SD LLC	3/28/2024	PRINTING	124.08
0100	14132716	BORDER RECAPPING, LLC	3/28/2024	M&O Services	468.68
0100	14132717	THE STEPPING STONES GROUP, LLC	3/28/2024	SPED SERVICES	2,077.37
0100	14132718	TOTAL VISION PC, INC.	3/28/2024	SPED SERVICES	1,330.00
0100	14132719	VERBAL BEHAVIOR ASSOCIATES, INC.	3/28/2024	SPED SERVICES	7,079.62
0100	14132720	VIRGINA LOPEZ	3/28/2024	REIMBURSEMENT	27.00
0100	14132721	WAXIE SANITARY SUPPLY	3/28/2024	Custodial Supplies	4,280.41
0100	14132722	WELLS FARGO VENDOR FINANCIAL SERVICES	3/28/2024	COPIER LEASE AND COPIES	238.06
0100	14132723	WOODWIND & BRASSWIND	3/28/2024	MUSIC EQUIPMENT	1,151.85
<b>0100 TOTAL</b>				<b>GENERAL</b>	<b>1,095,655.43</b>
0800	14122790	AMAZON CAPITAL SERVICES, INC.	3/4/2024	SUPPLIES	2,451.90
0800	14129872	MISSION FEDERAL CREDIT UNION	3/21/2024	P CARD	(2,505.51)
0800	14131522	AMAZON CAPITAL SERVICES, INC.	3/25/2024	ASB SUPPLIES	531.20
0800	14132695	CLIFFORD MULL	3/28/2024	REIMBURSEMENT	336.86
<b>0800 TOTAL</b>				<b>ASB</b>	<b>814.45</b>
1200	14122790	AMAZON CAPITAL SERVICES, INC.	3/4/2024	SUPPLIES	889.41
1200	14127236	Arcenia Z Jiron	3/14/2024	SUPPLY REIMBURSEMENT	13.03
1200	14127244	CORODATA SHREDDING, INC.	3/14/2024	SHREDDING SERVICE	5.00
1200	14128773	SAN DIEGO GAS & ELECTRIC	3/18/2024	GAS AND ELECTRIC	393.38
1200	14129872	MISSION FEDERAL CREDIT UNION	3/21/2024	P CARD	784.50
1200	14129884	SAN DIEGO COUNTY OFFICE OF ED	3/21/2024	EARLY YEARS CONFERENCE - 1 DAY	220.00

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Fund	Warrant ID	Vendor Name	Payment Date	Invoice Item Description	Amount Charged to Fund
1200	14131522	AMAZON CAPITAL SERVICES, INC.	3/25/2024	SUPPLIES	(10.76)
1200	14131530	LAKESHORE LEARNING MATERIALS	3/25/2024	SUPPLIES	(10.00)
1200	14132654	AMAZON CAPITAL SERVICES, INC.	3/28/2024	SUPPLIES	1,269.65
1200	14132666	COX COMMUNICATIONS	3/28/2024	NETWORKING SERVICE	23.81
1200	14132671	EDCO DISPOSAL CORPORATION	3/28/2024	GARBAGE AND RECYCLING	37.17
1200	14132686	KELLI MORRISSEY	3/28/2024	REIMBURSEMENT	30.98
1200	14132712	SPARKLETTES	3/28/2024	WATER SERVICE	61.89
<b>1200 TOTAL</b>				<b>CHILD DEVELOPMENT</b>	<b>3,708.06</b>
1300	14124157	COZZINI BROS, INC	3/7/2024	SERVICES	45.00
1300	14124159	CULLIGAN	3/7/2024	SERVICES	64.54
1300	14124160	DASSI FAMILY FARM	3/7/2024	SUPPLIES	2,704.00
1300	14124162	DION & SONS, INC.	3/7/2024	FUEL	414.62
1300	14124163	DOMINO'S PIZZA	3/7/2024	CN Broadlin	14,907.33
1300	14124164	GOLD STAR FOODS INC	3/7/2024	FOOD	40,398.02
1300	14124167	IMPERIAL DADE	3/7/2024	SUPPLIES	4,244.53
1300	14124170	K GRAPHICS POSTERS	3/7/2024	MENUES	187.00
1300	14124171	KYOCERA DOCUMENT SOLUTIONS WEST, LLC	3/7/2024	COPIER LEASE AND COPIES	3.43
1300	14124175	INDIVIDUAL FOODSERVICE	3/7/2024	SUPPLIES	2,085.25
1300	14124189	SYSCO FOODS SERVICES	3/7/2024	CN Broadline	564.72
1300	14124191	WEBB'S RV SUPPLY	3/7/2024	CN Oil	23.45
1300	14125871	LUNCHASSIST, INC	3/11/2024	DISTRICT WIDE PRO	7,870.00
1300	14127267	KRISTIE SUMMERS	3/14/2024	EQUIPMENT REIMBURSEMENT	700.36
1300	14128752	AT&T	3/18/2024	PHONE SERVICE	20.61
1300	14128757	ECONOMY RESTAURANT & SUPPLY CO	3/18/2024	ECONOMY- 1/3 SIZE INSULATED CH	758.17
1300	14128758	EL CAJON FORD	3/18/2024	NEW BOX TRUCKS	99,167.71
1300	14128762	HOLLANDIA DAIRY	3/18/2024	CN Broadline	27,092.37
1300	14128780	SYSCO FOODS SERVICES	3/18/2024	CN Broadline	699.00
1300	14128783	VERIZON WIRELESS	3/18/2024	CELL SERVICE	50.94
1300	14129850	CINTAS CORPORATION	3/21/2024	CN Services	149.88
1300	14129853	DASSI FAMILY FARM	3/21/2024	FOOD	546.00
1300	14129858	DION & SONS, INC.	3/21/2024	FUEL CHARGES	248.59
1300	14129868	KYOCERA DOCUMENT SOLUTIONS WEST, LLC	3/21/2024	COPIER LEASE AND COPIES	3.43
1300	14129872	MISSION FEDERAL CREDIT UNION	3/21/2024	P CARD	982.83
1300	14129880	DENISE PURGASON	3/21/2024	MEAL ACCOUNT REFUND	10.25
1300	14132649	4IMPRINT, INC.	3/28/2024	PRINTING	1,646.53
1300	14132654	AMAZON CAPITAL SERVICES, INC.	3/28/2024	CN Supplies	1,984.84

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Fund	Warrant ID	Vendor Name	Payment Date	Invoice Item Description	Amount Charged to Fund
1300	14132661	CALIF DEPT OF EDUCATION	3/28/2024	CN Broadline	399.75
1300	14132663	CINTAS CORPORATION	3/28/2024	CN Services	147.48
1300	14132673	ES FOODS INC.	3/28/2024	ESS FOODS	9,742.66
1300	14132683	IMPERIAL DADE	3/28/2024	CN Supplies	1,812.23
1300	14132687	K GRAPHICS POSTERS	3/28/2024	CN Services	440.00
1300	14132702	INDIVIDUAL FOODSERVICE	3/28/2024	CN Supplies	809.70
1300	14132710	SMART & FINAL: ACCT #398869	3/28/2024	CN Supplies	23.98
1300	14132712	SPARKLETTTS	3/28/2024	CN Water Service	28.98
1300	14132713	SYSCO FOODS SERVICES	3/28/2024	CN Broadline	739.04
<b>1300 TOTAL</b>				<b>CHILD NUTRITION</b>	<b>221,717.22</b>
2519	020091	PACIFIC MOBILE STRUCTURES, INC.	3/11/2024	DO Trailer Rental	891.10
2519	14129846	ALPHA STUDIO DESIGN GROUP	3/21/2024	Tech Project Architect Fees	3,250.00
2519	14132697	NATIONAL CONSTRUCTION RENTALS, INC.	3/28/2024	2 Station Restroom Trailer Ren	2,015.50
<b>2519 TOTAL</b>				<b>CAPITAL FACILITIES</b>	<b>6,156.60</b>
4000	14131521	ALPHA STUDIO DESIGN GROUP	3/25/2024	ARCHITECT FEES	13,112.50
<b>4000 TOTAL</b>				<b>SPECIAL RESERVE</b>	<b>13,112.50</b>
6200	14124156	RON COOK	3/7/2024	VIDEO PRODUCTION	1,500.00
6200	14127239	AMAZON CAPITAL SERVICES, INC.	3/14/2024	SUPPLIES BICS	1,615.22
6200	14127243	RON COOK	3/14/2024	VIDEO PRODUCTION	1,500.00
6200	14127265	SPECIALIZED THERAPY SERVICES	3/14/2024	SPED SERVICES BICS	12,152.13
6200	14127268	Technical Support For Special Education,	3/14/2024	SPED SERVICES	10,440.00
6200	14127270	U.S. BANK CORPORATE PYMT SYS	3/14/2024	BICS CREDIT CARD	3,697.92
6200	14129848	Barona Band of Mission Indians	3/21/2024	BICS FUEL	131.15
<b>6200 TOTAL</b>				<b>BARONA CHARTER</b>	<b>31,036.42</b>
6201	14122793	BUREAU OF EDUCATION + RESEARCH, INC.	3/4/2024	BUILDING THE SKILL AND CONFIDE	279.00
6201	14122802	PITNEY BOWES INC.	3/4/2024	RVCS LEASE AGREEMENT	104.94
6201	14122806	SOUTHWEST SCHOOL & OFFICE SUPPLY	3/4/2024	SUPPLIES PROJECTS WEEK- GIAVAN	132.53
6201	14122812	XEROX FINANCIAL SERVICES, LLC	3/4/2024	COPIER	1,291.09
6201	14124179	RIVER VALLEY CHARTER SCHOOL PTO	3/7/2024	SUPPLIES	340.50
6201	14124185	SOUTHWEST SCHOOL & OFFICE SUPPLY	3/7/2024	SUPPLIES	454.73
6201	14125868	ANECO PEST MANAGEMENT	3/11/2024	BI-MONTLY TREATMENT SERVICE	495.00
6201	14127238	Richard Neal Benzing	3/14/2024	SUPPLY REIMBURSEMENT	25.85
6201	14127249	DAVID LEE	3/14/2024	SUPPLY REIMBURSEMENT	85.00
6201	14127259	SUSAN MCINTOSH	3/14/2024	SUPPLY REIMBURSEMENT	22.27
6201	14128752	AT&T	3/18/2024	PHONE SERVICE	105.97
6201	14128754	BRIGHAM YOUNG UNIVERSITY	3/18/2024	HSS ENROLLMENT	4,760.00

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Fund	Warrant ID	Vendor Name	Payment Date	Invoice Item Description	Amount Charged to Fund
6201	14128755	CDW GOVERNMENT, INC.	3/18/2024	LENOVO 14E CHROMEBOOK GEN 2-14	7,250.76
6201	14128760	GROSSMONT UNION HIGH SCHOOL DISTRICT	3/18/2024	ELCAPITAN POOL USE	880.00
6201	14128761	HIGH TECH HIGH	3/18/2024	ATHLETE ENTRIES FOR THUNDER SW	150.00
6201	14128773	SAN DIEGO GAS & ELECTRIC	3/18/2024	GAS AND ELECTRIC	3,536.77
6201	14128779	SOUTHERN RECOGNITION,INC.	3/18/2024	DIPLOMA COVERS	748.63
6201	14128788	WILKINSON HADLEY KING & CO LLP	3/18/2024	PROGRESS BILL FOR 2022-23 AUDI	5,100.00
6201	14129849	CALIFORNIA COAST CREDIT UNION	3/21/2024	BICS CREDIT CARD	1,788.19
6201	14129851	RON COOK	3/21/2024	VIDEO PRODUCTION	1,100.00
6201	14129879	PURCHASE POWER	3/21/2024	POSTAGE	461.82
6201	14131529	HOME DEPOT CREDIT SERVICES	3/25/2024	SUPPLIES	425.00
6201	14131535	SOUTHWEST SCHOOL & OFFICE SUPPLY	3/25/2024	SUPPLIES	230.36
6201	14131538	YOUNG, MINNEY & CORR LLP	3/25/2024	LEGAL SERVICES	2,705.00
6201	14132664	STACY CLARK	3/28/2024	REIMBURSEMENT	20.00
6201	14132666	COX COMMUNICATIONS	3/28/2024	NETWORKING SERVICE	990.00
6201	14132671	EDCO DISPOSAL CORPORATION	3/28/2024	GARBAGE AND ELECTRIC	284.82
6201	14132676	Facilitron, Inc.	3/28/2024	FACILITY USE	5,080.00
6201	14132694	MRC	3/28/2024	TONER CARTRIDGES	59.26
6201	14132712	SPARKLETTS	3/28/2024	RVCS Water Service	339.28
6201	14132721	WAXIE SANITARY SUPPLY	3/28/2024	RVCS CLEANING SUPPLIES	27.10
<b>6201 TOTAL</b>				<b>RIVER VALLEY CHARTER</b>	<b>39,273.87</b>
				<b>GRAND TOTAL</b>	<b>1,411,474.55</b>



LAKESIDE UNION SCHOOL DISTRICT  
RCF 2324-0008 & 0009

#	Date	Ck#	Name	Memo/Description	Check Amount
RCF 2324-0009	2/28/2024	40319	Ana Stewart	December 2022 American Fidelity Life Insurance refund	26.76
RCF 2324-0009	3/4/2024	40320	Jaimi Myers	Feb 2024 Payroll failed, March 2024 O/C failed too.	4,352.89
RCF 2324-0009	3/7/2024	40321	Anelise Smosna	Feb Payroll Delayed Via Postal Mail	4,629.18
RCF 2324-0009	3/8/2024	40322	Cody Michael Kiper	Feb Payroll Damaged	197.06
RCF 2324-0010	3/18/2024	40323	Sharon Sullinger	August 2023 Payroll for June Time Overage	158.94
RCF 2324-0010	3/20/2024	40324	Ace Radiator	Transportation Dept.	675.00
					<b>\$ 10,039.83</b>

# LAKESIDE UNION SCHOOL DISTRICT

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**Governing Board Meeting Date:** APRIL 11, 2024

**Agenda Item:**

Ratification of Purchase Orders and Change Orders Listing (March 1 through March 31, 2024)

**Background (Describe the purpose/rationale of the agenda item):**

The Governing Board must ratify all purchase orders and change orders that have been created pursuant to the authority granted under Education Code 17605 and Board Policy 3300 that authorizes staff to purchase supplies, materials, equipment, and services up to the amounts specified in Public Contract Code 20111. In addition, the Governing Board should review and ratify all purchase orders and change orders from March 1 through March 31, 2024 are attached.

**Fiscal Impact (Cost):**

\$184,012.44

**Funding Source:**

General Fund Total: \$168,441.17 Student Body ASB Total: \$0.00, Child Development Total: \$0.00 Child Nutrition Total: \$15,571.27 Bond Fund Total: \$0.00

**Addresses Emphasis Goal(s):**

#1: Academic Achievement       #2: Social Emotional       #3: Physical Environments

**Recommended Action:**

- |                                        |                                                                 |
|----------------------------------------|-----------------------------------------------------------------|
| <input type="checkbox"/> Informational | <input type="checkbox"/> Denial/Rejection                       |
| <input type="checkbox"/> Discussion    | <input checked="" type="checkbox"/> Ratification                |
| <input type="checkbox"/> Approval      | <input type="checkbox"/> Explanation: Click here to enter text. |
| <input type="checkbox"/> Adoption      |                                                                 |

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**Originating Department/School:** Business Services

**Submitted/Recommended By:**

**Approved for Submission to the Governing Board:**



Lisa Davis, Assistant Superintendent



Dr. Rhonda Taylor, Superintendent

**Reviewed by Cabinet Member** \_\_\_\_\_

MARCH 2024 PURCHASE ORDERS

PO No.	Supplier	PO Ref	Func	Site/Dept	total by Account
10202	N2Y, INC/UNIQUE LEARNING SYS.	L3 Skills Subscription Ian	0100	Special Education	62.66
10251	J.W. PEPPER & SON, INC.	LMS JW Pepper	0100	Tierra Del Sol	67.50
10200	J.W. PEPPER & SON, INC.	LMS MULTIPLE INVOICES	0100	Tierra Del Sol	83.62
10207	WPS	CAAP-2 phon process eval	0100	Special Education	111.42
10229	HEINEMANN	RSP Fraction Kits	0100	Education Services	124.02
10201	DIDAX, INC.	Foam Fraction Circles Jen	0100	Special Education	142.23
10198	SAN DIEGO COUNTY OFFICE OF ED	SUSPENSION & EXPULSION TRAININ	0100	Pupil Services	150.85
10222	AMAZON CAPITAL SERVICES, INC.	TK Puzzles	0100	Lakeview	166.21
10221	SMIRTHWAITE USA LLC	Battery Charger for Paukovits	0100	Special Education	279.42
10209	CRISP ENTERPRISES, INC./CRISP IMAGING	TDS CERTIFICATES	0100	Tierra Del Sol	320.00
10254	ASCD	ASCD RENEWALS	0100	Superintendent	393.42
10195	MFAC, LLC	TDS FIRST PLACE CROSSBARS	0100	Tierra Del Sol	443.00
10208	CALIF. ASSOC. FUTURE FARMERS OF AMERICA	INVOICE 116067 LMS FFA	0100	Lakeside Middle School	450.00
10244	HYDROTEX	DIESEL ADDITIVE TO REDUCE EMIS	0100	Transportation	513.37
10211	SAFE SCHOOLS CONFERENCE	Safe Schools Conf July 2024	0100	Superintendent	599.00
10238	PAR, INC.	Psych Assess Stock DO	0100	Psychology Services	666.81
10205	DATEL SYSTEMS INCORPORATED	D.O. Boardroom Mic	0100	Superintendent	770.41
10225	Resource Conservation District of Greate	FIELD TRIP ADMISSION	0100	Flex School	832.50
10233	SAN DIEGO AIR & SPACE MUSEUM	DA Admission & Educational Wor	0100	Flex School	845.00
10241	Lindamood-Bell Learning Processes	Browan Viz-Verb train	0100	Special Education	850.00
10210	FUNDRAISING MANAGER	INVOICE 37258 Band Fundraiser	0100	Lakeside Middle School	901.60
10239	NCS PEARSON, INC	46241 BEERY VMI FULL FORMS	0100	Psychology Services	1,024.35
10197	School Threat Assessment Consultants LLC	Threat Assmt. Books	0100	Pupil Services	1,080.00
10219	SCHOOL PSYCH AI	PSYCH ASSESSMENTS	0100	Psychology Services	1,100.00
10237	WESTERN ENVIRONMENTAL & SAFETY	CK Asbestos Inspection	0100	Child Nutrition	1,135.00
10231	PLAY CITY AMUSEMENT CENTER LLC	PLAY CITY AMUSEMENT FIELDTRIP	0100	ESS/ASES/PreSchool	1,200.00
10223	CARDBOARD TECK LLC	PinBox	0100	Tierra Del Sol	1,205.60
10213	SEA WORLD OF CALIFORNIA	5/28/24 Admis Seaworld 5th GR	0100	Riverview	1,208.00
10252	Jennifer Collado-Perez	Feb - Mar Mileage	0100	Special Education	1,462.61
10248	COAST MUSIC THERAPY INC.	CONSULTATION BETWEEN MUSIC TH	0100	Special Education	1,875.00
10234	BERTRANDS MUSIC ENTERPRISES INC	2023/24 Instrument Repairs	0100	Lakeside Middle School	2,000.00
10206	Day Management Corp./Day Wireless System	RV walkie Talkies srvc 3/4/24	0100	Riverview	2,772.67
10216	SCHOOLHOUSE CONNECTION	CA HOMELESS EDUCATION CONFEREN	0100	Pupil Services	2,825.00
10230	AMAZON CAPITAL SERVICES, INC.	LMS 3D PRINTER	0100	Education Services	2,909.25
10253	Jennifer Collado-Perez	Feb-Mar Tuition	0100	Special Education	3,250.00
10196	DATEL SYSTEMS INCORPORATED	2 Tech Computers	0100	Technology	3,575.15
10217	DATEL SYSTEMS INCORPORATED	COMPUTER FOR ESS PROG	0100	ESS/ASES/PreSchool	3,590.54
10203	WESTERN ENVIRONMENTAL & SAFETY	6 MONTH & 3 YEAR RE-INSPECTION	0100	Maintenance & Operations	3,785.00
10228	JOSTENS	BALANCE OWED FOR 22-23 JOSTENS	0100	Riverview	4,111.92
10218	SCHOLASTIC INC	SCHOLASTIC 23/24	0100	Lakeside Farms	4,203.04
10245	JASON DEGTYAREV	2023/24 PSYCH ED EVAL	0100	Psychology Services	4,250.00
10250	LANGUAGE TESTING INTERNATIONAL, INC.	AAPPL Assessment	0100	Education Services	5,000.00
10249	APRIL K ROBINSON	Tutoring Svc Hensley	0100	Special Education	5,730.00
10240	Brett Allen dba ALLEN ESQ	LEGAL FEE	0100	Special Education	7,000.00
10232	National Speakers Bureau, Inc	SPEAKER FOR WELCOME BACK	0100	Superintendent	8,025.00
10243	The Koonings Center	NPS	0100	Special Education	12,500.00
					<b>\$ 95,591.17</b>
10204	4IMPRINT, INC.	CN - LUNCH HEROS	1300	Child Nutrition	1,646.53
10215	UNION TRIBUNE PUBLISHING CO.	CN Union Tribune Legal AD	1300	Child Nutrition	1,844.42
10242	DESCON	C/N Descon	1300	Child Nutrition	4,615.80
					<b>\$ 8,106.75</b>

**TOTAL PURCHASE ORDERS \$ 103,697.92**

<b>TOTAL (01) GENERAL FUND PO's</b>	<b>95,591.17</b>
<b>TOTAL (08) ASB FUND PO's</b>	<b>0.00</b>
<b>TOTAL (12) CHILD DEVELOPMENT PO's</b>	<b>0.00</b>
<b>TOTAL (13) CHILD NUTRITION FUND PO's</b>	<b>8,106.75</b>
<b>TOTAL (25) DEVELOPER FEES PO's</b>	<b>0.00</b>
<b>TOTAL (40) SPECIAL FUND P</b>	<b>0.00</b>

MARCH 2024 CHANGE ORDERS

PO No.	Supplier	PO Ref	Func	Site/Dept	Total
9450	O'REILLY AUTO PARTS	C/O O'Reilly	0100	Maintenance & Operations	1,000.00
9421	ALLIED REFRIGERATION INC	C/O ARI	0100	Maintenance & Operations	1,000.00
9463	AAA WATER TENDER	C/O A&B Saw	0100	Maintenance & Operations	500.00
9247	AMAZON CAPITAL SERVICES, INC.	C/O Amazon LV	0100	Lakeview	1,400.00
9423	AZUMA TECH SYSTEMS INC.	C/O Azuma	0100	Maintenance & Operations	3,000.00
9446	LAKESIDE EQUIPMENT	C/O Lakeside Equip	0100	Maintenance & Operations	5,000.00
8690	AMAZON CAPITAL SERVICES, INC.	C/O Amazon CAASPP Testing	0100	Education Services	2,500.00
9456	SITEONE LANDSCAPE SUPPLY HOLD	C/O SiteOne	0100	Maintenance & Operations	1,500.00
9545	CURRIER & HUDSON	C/O Currier & Hudson	0100	Superintendent	25,000.00
9353	EAST PENN MFG CO	C/O East Penn SpEd	0100	Transportation	1,000.00
9439	HAWTHORNE RENT-IT SERVICE	C/O Hawthorne	0100	Maintenance & Operations	1,000.00
9425	BORDER RECAPPING, LLC	C/O Border Recapping	0100	Maintenance & Operations	1,000.00
9427	CAMEO PAPER & JANITORIAL	C/O Cameo	0100	Maintenance & Operations	1,000.00
					<b>\$ 72,850.00</b>

8720	ES FOODS INC.	C/O ES Foods	1300	Child Nutrition	\$ 4,514.52
10156	EL CAJON FORD	C/O PO 10156 CN F550 #2	1300	Child Nutrition	\$ 2,950.00
					<b>\$ 7,464.52</b>

**TOTAL CHANGE ORDERS \$ 80,314.52**

<b>TOTAL (01) GENERAL FUND CO's</b>	<b>72,850.00</b>
<b>TOTAL (08) ASB FUND CO's</b>	<b>0.00</b>
<b>TOTAL (12) CHILD DEVELOPMENT FUND CO's</b>	<b>0.00</b>
<b>TOTAL (13) CHILD NUTRITION FUND CO's</b>	<b>7,464.52</b>
<b>TOTAL (25) DEVELOPER FEES CO's</b>	<b>0.00</b>
<b>TOTAL (40) SPECAIL FUND C</b>	<b>0.00</b>

# LAKESIDE UNION SCHOOL DISTRICT

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**Governing Board Meeting Date:** April 11, 2024

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**Agenda Item:**

Ratification of P Card expenditure transactions for the month of February 2024.

**Background (Describe purpose/rationale of the agenda item):**

It is recommended that The Governing Board approve/ratify expenditure transactions charged to District P Cards for the month of February 2024.

**Fiscal Impact (Cost):**

\$14,767.54

**Funding Source:**

General Fund Total: \$15,505.72, ASB Fund Total: -2505.51, Child Development Fund Total: \$784.50, Child Nutrition: \$982.83

**Addresses Emphasis Goal(s):**

**#1:** Academic Achievement       **#2:** Social Emotional       **#3:** Physical Environments

**Recommended Action:**

- |                                                     |                                                                        |
|-----------------------------------------------------|------------------------------------------------------------------------|
| <input type="checkbox"/> <b>Informational</b>       | <input type="checkbox"/> <b>Denial/Rejection</b>                       |
| <input type="checkbox"/> <b>Discussion</b>          | <input checked="" type="checkbox"/> <b>Ratification</b>                |
| <input checked="" type="checkbox"/> <b>Approval</b> | <input type="checkbox"/> <b>Explanation:</b> Click here to enter text. |
| <input type="checkbox"/> <b>Adoption</b>            |                                                                        |

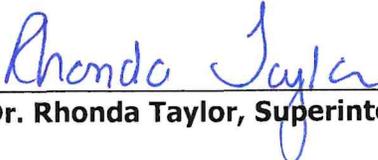
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**Originating Department/School:** Business Services

**Submitted/Recommended By:**

**Approved for Submission to the Governing Board:**

  
\_\_\_\_\_  
Lisa Davis, Assistant Superintendent

  
\_\_\_\_\_  
Dr. Rhonda Taylor, Superintendent

**Reviewed by Cabinet Member** \_\_\_\_\_

FEBRUARY 2024  
P CARD PURCHASES

ACC.ACCOUNT NAME	FIN.POSTING DATE	FIN.TRANSACTION AMOUNT	MCH.MERCHANT NAME	FUND	FIN.EXPENSE DESCRIPTION
BEISIGL,BRIAN	02/04/2024	285.81	AMAZON WEB SERVICES	0100	CLOUD HOSTING
BEISIGL,BRIAN	02/01/2024	97.41	BEST BUY 00001842	0100	SPARE HARDWARE FOR DISTRICT
BOWMAN,ROBYN	02/28/2024	49.08	LAKESHORE LEARNING MA	1200	WRIST RIBBONS, TRACE & WRITE ALPHABET CENTER
BOWMAN,ROBYN	02/28/2024	10.24	WAL-MART #2253	1200	SNACKS
BOWMAN,ROBYN	02/25/2024	127.43	WAL-MART #2253	1200	SNACK ITEMS, CLEANING SUPPLIES, PAPER GOODS...
BOWMAN,ROBYN	02/25/2024	588.93	SAMSClub #6235	1200	SNACKS, CLEANING PRODUCTS, PAPER GOODS, OFFICE SUPPLIES...
BOWMAN,ROBYN	02/08/2024	8.82	WALGREENS #11990	1200	STUDENT PHOTOS
CLARK,DANIELLE	02/27/2024	21.55	DOLLARTREE	0100	SDC INCENTIVES J. WALLER CLASS LP
CLARK,DANIELLE	02/27/2024	76.94	SMART AND FINAL 929	0100	SDC INCENTIVES J. WALLER CLASS LP
CLARK,DANIELLE	02/21/2024	25.08	ALLIES GIFTS AND SHIPP	0100	RETURN WRONG CPI WORKBOOKS
CLARK,DANIELLE	02/02/2024	267	CONTINUED.COM	0100	YEARLY MEMBERSHIP "CONTINUED" FOR 3 SLP'S
COX,GRACE	02/08/2024	575	BRAINPOP.COM	0100	ANIMATED EDUCATIONAL SITE FOR KIDS - SCIENCE, SOCIAL STUDIES, ENGLISH, MATH, ARTS & MUSIC, HEALTH, AND TECHNOLOGY.
DAVIS,LISA	02/29/2024	75	CMT SACRAMENTO27680016	0100	TAXI-ACSA BUSINESS SERVICES COUNCIL, TO BE REIMBURSED
DAVIS,LISA	02/28/2024	645	INTUIT *QBOOKS ONLINE	0100	QUICKBOOKS SOFTWARE
DAVIS,LISA	02/22/2024	641.26	HARBOR FREIGHT TOOLS 1	0100	SPLIT-TOOLS MAINTENANCE (50%)
DAVIS,LISA	02/22/2024	641.26	HARBOR FREIGHT TOOLS 1	0100	SPLIT -TOOLS MAINTENANCE (50%)
DAVIS,LISA	02/04/2024	53	SQ *BAKER MOBILE NOTAR	0100	EASEMENT NOTARIZED
DEROSIER,LISA A	02/28/2024	32.5	TST* NOTHING BUNDT CAK	0100	BUNDLETS FOR EMPLOYEES OF THE YEAR.
DEROSIER,LISA A	02/23/2024	26	TST* NOTHING BUNDT CAK	0100	BUNDLETS FOR EMPLOYEES OF THE YEAR - MISSING RECEIPT
DEROSIER,LISA A	02/01/2024	116.69	INDEED 88450666	0100	JOBS ON INDEED.COM (HR)
FERNANDEZ,PATRICIA	02/08/2024	187.33	LEGAL BOOKS DISTRIBUTI	0100	STUDENT DISCIPLINE IN CA SCHOOLS 2024 BOOK, AND CA LAWS RELATING TO MINORS 2024 BOOK
FERNANDEZ,PATRICIA	02/02/2024	202.95	SOUTHWEST AIRLINES	0100	TRAVEL TO SACRAMENTO CONFERENCE TO BE REIMBURSED BY SDCOE
GREEN,TESSA	02/08/2024	156.46	GARDEN FARMS #2	0100	LP STAFF MEETING SUPPLIES
GREEN,TESSA	02/04/2024	107	DOLLAR TREE	0100	KISS DANCE DECORATIONS
HARDIMAN,LESLIE	02/12/2024	35.99	WONDERSHARE.COM	0100	1 YEAR SIMULTANEOUS ONLINE DEVICES
MULL,STEVE	02/15/2024	520	EZ VAN RENTAL	0100	VAN RENTAL FOR FFA EVENT
MULL,STEVE	02/08/2024	116.3	WEISSMAN'S THEATRICAL	0100	DRAMA COSTUMES
MURPHY,JERRED C	02/27/2024	37.84	MARY'S DONUTS	0100	DONUTS FOR STAFF MEETING
MURPHY,JERRED C	02/21/2024	32.48	99-CENTS-ONLY #0080	0100	TALL ROUND PLASTIC PANS (10)
MURPHY,JERRED C	02/21/2024	12.93	99 CENTS ONLY STORES #	0100	TALL ROUND PLASTIC PANS (4)
MURPHY,JERRED C	02/21/2024	15.09	99 CENTS ONLY STORES #	0100	OVAL TUBS (7)
MURPHY,JERRED C	02/04/2024	16.16	DOLLARTREE	0100	BUCKETS WITH HANDLES
MURPHY,JERRED C	02/04/2024	740.32	SAMS CLUB #6235	0100	MISC SNACK ITEMS FOR SITE
MURPHY,JERRED C	02/02/2024	50	LIVING WATER	0100	BOTTLED WATER FOR SITES
ORAHOOD,SAMANTHA	02/28/2024	629.37	DELTA HOTELS	0100	G. LOPEZ CASTO 56TH ANNUAL CONFERENCE
ORAHOOD,SAMANTHA	02/08/2024	709.74	OMNI HOTELS	0100	(2) CSNO CONFERENCE
ORAHOOD,SAMANTHA	02/06/2024	2036.92	HARBOR FREIGHT TOOLS 1	0100	SPLIT - MECHANIC TOOL REPLENISHMENT (50%)
ORAHOOD,SAMANTHA	02/06/2024	2036.92	HARBOR FREIGHT TOOLS 1	0100	SPLIT - MECHANIC TOOL REPLENISHMENT (50%)
ORAHOOD,SAMANTHA	02/06/2024	1650	SOUND CHECK MOBILE ELE	0100	INSTALL SAFETY MODULES
ORAHOOD,SAMANTHA	02/05/2024	457.08	HYATT HOTELS	0100	N. FARREN CAHPERD 2024 CONFERENCE
ORAHOOD,SAMANTHA	02/01/2024	-2505.51	KNOTT'S BERRY FARM ONL	0800	LMS KNOTT'S BERRY FARMS TRIP 5/9/2024
OWENS,TODD	02/28/2024	140	WINTERGARDENS AUTO UP!	0100	REPAIR VACUUM BAGS
OWENS,TODD	02/18/2024	82.96	AUTOZONE #3341	0100	INJECTOR INSTALL KIT FOR BUS 50
OWENS,TODD	02/15/2024	73.03	AMERAPRODUC	0100	KEYS AND BREAK LOCK LATCHES FOR FIRE EXTINGUISHER CABINETS
OWENS,TODD	02/04/2024	134.56	U-HAUL CTR EL CAJON	0100	U-HAUL FOR CAMP CUYAMACA LUGGAGE
OWENS,TODD	02/04/2024	36.12	U-HAUL CTR EL CAJON	0100	U-HAUL FOR CAMP CUYAMACA LUGGAGE
ROSA,JIM	02/23/2024	160.15	PRIMO WATER	0100	WATER DELIVERY
ROSA,JIM	02/12/2024	150.45	GWJ CO	0100	LAMINATING FILM
ROSA,JIM	02/04/2024	499.94	WALMART.COM 8009666546	0100	CHAIR DOLLY
SINATRA,CHRISTINE	02/09/2024	102.84	GRUBHUBJERSEYMIKES	0100	INTERVIEW PANEL LUNCH HR-ASSIST.
SUMMERS,KRISTIE	02/28/2024	91.86	GROCERY OUTLET OF LA	1300	SPECIAL DIETS FOODS
SUMMERS,KRISTIE	02/19/2024	11.06	HOBBY-LOBBY #658	1300	SIGNAGE FOR CENTRAL KITCHEN - CONVERSION CHART
SUMMERS,KRISTIE	02/18/2024	146	SCHOOL NUTRITION ASSOC	1300	MEMBERSHIPS FOR SCHOOL NUTRITION ASSOCIATION - NATIONAL AND CALIFORNIA SCHOOL NUTRITION ASSOCIATION FOR KRISTIE SUMMERS
SUMMERS,KRISTIE	02/11/2024	394.74	THE WEBSTAUURANT STORE	1300	ROBOT COUPE PARTS
SUMMERS,KRISTIE	02/09/2024	44.41	GROCERY OUTLET OF LA	1300	SPECIAL DIETS FOODS
SUMMERS,KRISTIE	02/04/2024	115.76	MISSION NUTRITION	1300	SACK LUNCH BAGS FOR FIELD TRIPS
SUMMERS,KRISTIE	02/01/2024	179	NTLREST SERVS SAFE	1300	SERVS SAFE CLASS AND CERTIFICATIONS FOR KRISTIE SUMMERS
TAYLOR,RHONDA L	02/23/2024	117.05	ALLEN'S FLOWERS & PLAN	0100	FLOWERS FROM THE BOARD TO A PAST BOARD MEMBER FOR THE DEATH OF HER SON.
WINSPEAR,NATALIE	02/23/2024	562.26	HMCO *BOOKS	0100	FRACTION KITS FOR RSP TEACHERS
WINSPEAR,NATALIE	02/07/2024	15.99	ZOOM.US 888-799-9666	0100	ZOOM ACCOUNT FOR VIRTUAL LCAP PARENT INPUT NIGHT
WINSPEAR,NATALIE	02/06/2024	99.99	PADLET* PADLET SOFTWARE	0100	PADELT PLATINUM ANNUAL SUBSCRIPTION

14,767.54

# LAKESIDE UNION SCHOOL DISTRICT

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**Governing Board Meeting Date:** April 11, 2024

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**Agenda Item:**

Approval of the April contracts list for the fiscal year, 2023-24.

**Background (Describe purpose/rationale of the agenda item):**

Approval is requested for the attached list of agreements with outside vendors for fiscal year, 2023-24.

**Fiscal Impact (Cost):**

See attached list.

**Funding Source:**

General Fund.

**Addresses Emphasis Goal(s):**

**#1:** Academic Achievement       **#2:** Social Emotional       **#3:** Physical Environments

**Recommended Action:**

- |                                                     |                                                                                        |
|-----------------------------------------------------|----------------------------------------------------------------------------------------|
| <input type="checkbox"/> <b>Informational</b>       | <input type="checkbox"/> <b>Denial/Rejection</b>                                       |
| <input type="checkbox"/> <b>Discussion</b>          | <input type="checkbox"/> <b>Ratification</b>                                           |
| <input checked="" type="checkbox"/> <b>Approval</b> | <input type="checkbox"/> <b>Explanation:</b> <a href="#">Click here to enter text.</a> |
| <input type="checkbox"/> <b>Adoption</b>            |                                                                                        |

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**Originating Department/School:** Business Services

**Submitted/Recommended By:**

**Approved for Submission to the Governing Board:**



Lisa Davis, Assistant Superintendent



Dr. Rhonda Taylor, Superintendent

**Reviewed by Cabinet Member**

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LUSD CONTRACTS 2023-24

Agency Name	Description	Contract #	Dept./Site	Began	Ends	Amount (not to exceed)
B2M (Boys 2 Men)	Mentoring	V2024-103	LMS	7/1/2023	6/30/2028	\$5,000.00
Apple Direct	Piggyback Consent Form Downey Unified	V2024-104	Business Services	10/6/2023		N/A
Connect4Kids Psychological Services	Addendum #2 to Original Agreement	I2024-07-2	SPED	3/11/2024	6/15/2024	\$2,640.00
Professional Tutors of America	Speech and Language, and OT Tutoring	V2024-105	SPED	7/1/2023	6/30/2024	See Attached Rate Sheet
Jennifer Collado-Perez	Parent /Guardian Transportation Agreement	T2024-002	SPED	4/1/2024	6/30/2024	\$35.11/day in mileage
Tiara Stoudenmire	Parent /Guardian Transportation Agreement	T2024-003	SPED	3/1/2024	6/30/2024	\$56.82/day in mileage
Jan Landau & 4 Retired Teachers	The Butterfly Project Now	L2024-12	LC	4/9/2024		N/A
Brian Moehl - San Diego Audubon Society	Presentation about Ecology and Native Americans Region	L2024-13	LC	4/11/2024	4/11/2024	\$0.00
Rob Riingen Photography	School Photography	L2024-014	TDS	4/9/2024	4/30/2024	Not To Exceed \$1,200
JT ADHD Coaching Addendum A	Special Services & Administrative Advice	I2024-13A	SPED	8/1/2023	6/30/2024	Not To Exceed \$5,000
Rancho Coastal Speech Therapy	Independent Education Evaluation (IEE) Speech and Language Evaluation	I2024-28	SPED	4/8/2024	6/30/2024	Not To Exceed \$2,550
Total Compensation Systems, Inc.	GASB 74/75 actuarial valuation services	V2024-106	BS	4/15/2024	6/30/2025	\$6,840.00
Health and Human Services Agency, Public Health Services, MCFHS	MOA for Nutrition Education, Oral Health, Tobacco Prevention, and Adolescent Health	V2024-107	Ed Services	4/15/2024	6/30/2028	N/A
Eastern San Diego County Junior Fair	Fairgrounds rental for Graduations	V2024-108	Maint	3/31/2024	6/13/2024	\$150/day

# LAKESIDE UNION SCHOOL DISTRICT

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**Governing Board Meeting Date:** April 11, 2024

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**Agenda Item:**

Adopt Resolution No. 2024-17, approving the California State Teachers' Retirement System (CalSTRS) Retirement Incentive Program, contingent upon receiving 5 total retirees to June 30, 2024.

**Background (Describe purpose/rationale of the agenda item):**

Pursuant to Education Code sections 22714, 44929 and 87488, the Lakeside Union School District has the authority to offer an "Early Retirement Incentive (ERI)" to employees who are eligible for retirement under CalSTRS. Each individual request to retire under the provisions of the ERI will be reviewed to determine the fiscal impact to the District. This Incentive will be contingent upon receiving 5 eligible retirees prior to June 30, 2024. Currently, the District has 4 retirees. If at the end of the year, 5 retirees have not submitted their letter of retirement, the incentive and this resolution will be rescinded.

**Fiscal Impact (Cost):**

The estimated cost of the ERI would be as follows, 2 Employees-Option III (2 years of CalSTRS credit) paid over 2 years for a total cost of \$144,186.43. The estimated net savings to the District of the ERI including the replacement of the two teachers in the next two fiscal years is \$165,538.57 per year.

**Funding Source:**

General Fund

**Addresses Emphasis Goal(s):**

**#1:** Academic Achievement       **#2:** Social Emotional       **#3:** Physical Environments

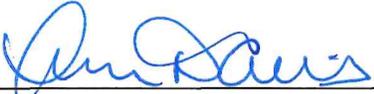
**Recommended Action:**

- |                                                     |                                                                                        |
|-----------------------------------------------------|----------------------------------------------------------------------------------------|
| <input type="checkbox"/> <b>Informational</b>       | <input type="checkbox"/> <b>Denial/Rejection</b>                                       |
| <input type="checkbox"/> <b>Discussion</b>          | <input type="checkbox"/> <b>Ratification</b>                                           |
| <input checked="" type="checkbox"/> <b>Approval</b> | <input type="checkbox"/> <b>Explanation:</b> <a href="#">Click here to enter text.</a> |
| <input type="checkbox"/> <b>Adoption</b>            |                                                                                        |

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**Originating Department/School:** Business Services

**Submitted/Recommended By:**

  
\_\_\_\_\_  
**Lisa Davis, Assistant Superintendent**

**Approved for Submission to the Governing Board:**

  
\_\_\_\_\_  
**Dr. Rhonda Taylor, Superintendent**

**Reviewed by Cabinet Member** \_\_\_\_\_



# LAKESIDE UNION SCHOOL DISTRICT

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**Governing Board Meeting Date:** April 11, 2024

**Agenda Item:**

Review and acceptance of the 2022-23 Bond Annual Audit Report by Wilkinson Hadley King & Co. LLP

**Background (Describe purpose/rationale of the agenda item):**

Education Code 41020.3 states the governing body of each local education agency shall review, at a public meeting, the annual audit of the local education agency for the prior year, any audit exceptions identified in that audit, the recommendations or findings of any management letter issued by the auditor and any description of correction or plans to correct any exceptions or management letter issue. This review shall be placed on the agenda of the meeting pursuant to Section 35145.

The LUSD auditor, Wilkinson Hadley King & Co, issued an opinion that the financial statements present fairly in all material respects, the respective financial position of the governmental activities, each major fund and the aggregate remaining fund information of LUSD, as of June 30, 2023.

As required by law, the Citizens Bond Oversight Committee has reviewed the Bond Audit at it's 3/20/2024 meeting.

There were no findings in the 2022-23 bond audit report.

**Fiscal Impact (Cost):**

N/A

**Funding Source:**

N/A

**Addresses Emphasis Goal(s):**

- #1: Academic Achievement       #2: Social Emotional       #3: Physical Environments

**Recommended Action:**

- |                                              |                                                                                 |
|----------------------------------------------|---------------------------------------------------------------------------------|
| <input type="checkbox"/> Informational       | <input type="checkbox"/> Denial/Rejection                                       |
| <input type="checkbox"/> Discussion          | <input type="checkbox"/> Ratification                                           |
| <input checked="" type="checkbox"/> Approval | <input type="checkbox"/> Explanation: <a href="#">Click here to enter text.</a> |
| <input type="checkbox"/> Adoption            |                                                                                 |

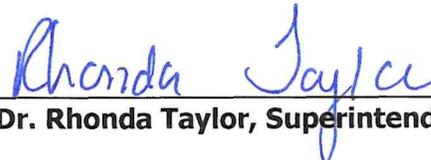
**Originating Department/School:** Business Services

**Submitted/Recommended By:**

**Approved for Submission to the Governing Board:**



**Lisa Davis, Assistant Superintendent**



**Dr. Rhonda Taylor, Superintendent**

**Reviewed by Cabinet Member** \_\_\_\_\_



Lakeside Union  
School District  
Proposition V &  
Measure L  
Building Fund (21-39)

Financial Statements &  
Supplementary Information

June 30, 2023



WILKINSON HADLEY  
KING & CO. LLP  
CPAs AND ADVISORS

**Lakeside Union School District**  
**Proposition V & Measure L Building Fund (21-39)**

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June 30, 2023

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# Lakeside Union School District

## Proposition V & Measure L Building Fund (21-39)

### Introduction & Citizens' Oversight Committee Member Listing

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On November 4, 2008 the Lakeside Union School District was successful under Proposition V in obtaining authorization from the District voters to issue up to \$79,550,000 in General Obligation Bonds pursuant to a 55% vote in a bond election.

The Board of Trustees of the District found and determined that, due to State law limitations imposed on the issuance of bonds under Proposition V, the balance of funds pending issuance would not be able to be acquired; therefore, on November 4, 2014, Lakeside Union School District was successful under Measure L in obtaining re-authorization from the District voters to issue up to \$31,000,000 in General Obligation Bonds pursuant to a 55% vote in a bond election.

The General Obligation Bonds are considered Proposition 39 bonds. The passage of Proposition 39 in November, 2000 amended the California Constitution to include accountability measures. Specifically, the District must conduct an annual, independent performance audit to ensure that funds have been expended only on the specific projects listed as well as an annual, independent audit of the proceeds from the sale of the bonds until all of the proceeds have been expended.

Upon passage of Proposition 39, an accompanying piece of legislation, AB 1908 was also enacted, which amended the Education Code to establish additional procedures which must be followed if a District seeks approval of a bond measure pursuant to the 55% majority authorized in Proposition 39 including formation, composition and purpose of the Independent Citizens' Oversight Committee, and authorization for injunctive relief against improper expenditure of bond revenues.

The Lakeside Union School District Proposition V and Measure L Independent Citizens' Oversight Committee as of June 30, 2023 was comprised of the following members:

<u>Name</u>	<u>Position</u>	<u>Representative</u>	<u>Term Expiration</u>
Kathy Kassel	Chair	Local Business Member	March 2025
Liz Huggins	Vice Chair	Senior Member	March 2025
Jennifer Lee Clancy	Member	Parent of enrolled student	February 2024
Frank Hilliker	Member	Member at large	March 2025
John Heredia	Member	Taxpayer Association Representative	February 2025
Britni Cobb	Member	Member at large	February 2024
Felicia Walton	Member	Parent/PTO Representative	February 2024

## **Independent Auditor's Report**

**To the Citizens' Oversight Committee  
Lakeside Union School District  
Proposition V & Measure L Building Fund (21-39)  
Lakeside, California**

### **Report on the Audit of the Financial Statements Opinion**

We have audited the accompanying financial statements of the Lakeside Union School District's Measure L Building Fund (Fund 21-39), which comprise the balance sheet as of June 30, 2023, and the related statement of revenues, expenditures, and changes in fund balance for the year then ended, and the related notes to the financial statements.

In our opinion, the financial statements referred to above present fairly, in all material respects, the assets, liabilities, and fund balance of the Bond Fund as of June 30, 2023, and the revenues it received and expenditures it paid for the year then ended, in accordance with the financial reporting provisions of Proposition 39 described in Note A.

### **Basis for Opinion**

We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Lakeside Union School District, including the Measure L Citizens' Oversight Committee, and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### **Emphasis of Matter – Basis of Accounting**

We draw attention to Note A of the financial statements, which describes the basis of accounting. The financial statements are prepared by the Lakeside Union School District using the modified accrual basis of accounting for the fund, which is a basis of accounting other than accounting principles generally accepted in the United States of America, to meet the financial reporting requirements under Proposition 39. Additionally, the financial statements present only the Bond Fund which is specific to Measure L and is not intended to present fairly the financial position and results of operations of the Lakeside Union School District as a whole. As a result, the financial statements may not be suitable for another purpose. Our opinion is not modified with respect to this matter.

### **Responsibilities of Management for the Financial Statements**

Management is responsible for the preparation and fair presentation of these financial statements in accordance with the financial reporting provisions for fund accounting under the modified accrual basis of accounting, as described in Note A. Management is also responsible for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Bond Fund's ability to continue as a going concern for twelve months beyond the financial statement date, including any currently known information that may raise substantial doubt shortly thereafter.

### **Auditor's Responsibilities for the Audit of the Financial Statements**

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Bond Fund's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Bond Fund's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

### **Required Supplementary Information**

Accounting principles generally accepted in the United States of America require that the management's discussion and analysis be presented to supplement the basic financial statements. Such information is the responsibility of management and, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board, who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

### **Other Reporting Required by *Government Auditing Standards***

In accordance with *Government Auditing Standards*, we have also issued our report dated February 20, 2024, on our consideration of the Bond Fund's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Bond Fund's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Bond Fund's internal control over financial reporting and compliance.

### **Report on Other Legal and Regulatory Requirements**

In accordance with the requirements of Proposition 39, as incorporated in California Constitution Article 13A, we have also issued our performance audit report dated December 15, 2023, on our consideration of the Bond Fund's compliance with the requirements of Proposition 39 with regards to the Measure L Building Fund (Fund 21-39). That report is an integral part of our audit of the Measure L Building Fund (Fund 21-39) for the fiscal year ended June 30, 2023, and should be considered in assessing the results of our financial audit.

### **Other Information**

Management is responsible for the other information included in the introductory section of this report. The other information comprises the introductory section but does not include the basic financial statements and our auditor's report thereon. Our opinions on the basic financial statements do not cover the other information, and we do not express an opinion or any form of assurance thereon.

In connection with our audit of the basic financial statements, our responsibility is to read the other information and consider whether a material inconsistency exists between the other information and the basic financial statements, or the other information otherwise appears to be materially misstated. If, based on the work performed, we conclude that an uncorrected material misstatement of the other information exists, we are required to describe it in our report.

### **Restriction on Use**

This report is intended solely for the information and use of management, the Citizens' Oversight Committee, the Board of Education, and others within the Lakeside Union School District, and is not intended to be and should not be used by anyone other than these specified parties.



El Cajon, California  
March 20, 2024

**LAKESIDE UNION SCHOOL DISTRICT**  
**PROPOSITION V & MEASURE L BUILDING FUND (21-39)**  
**MANAGEMENT’S DISCUSSION AND ANALYSIS**  
**JUNE 30, 2023**  
**(Unaudited)**

This section of Lakeside Union School District’s (District) Proposition V & Measure L Building Fund annual financial and performance audit report presents management’s discussion and analysis of the Bond Program during the year ending June 30, 2023. Readers should also review the financial statements and notes to the basic financial statements included in the audit report to enhance their understanding of the Proposition V & Measure L Bond Program’s financial and program performance.

**OVERVIEW OF THE FINANCIAL STATEMENTS**

The discussion and analysis is intended to serve as an introduction to the District’s Proposition V & Measure L Building Fund basic financial statements. The Fund’s financial statements comprise three components: 1) management’s discussion and analysis; 2) the Building Fund’s financial statements; and 3) the performance audit required by law.

The District accounts for Proposition V & Measure L activity in the District’s Building Fund (Fund 21-39). The Building Fund is a governmental fund type accounted for on a modified accrual basis of accounting that does not include fixed assets or long-term liabilities.

On November 4, 2008, the voters of the Lakeside Union School District community voted to approve Proposition V to authorize the District to issue up to \$79.5 million of general obligation bonds to finance certain specified capital projects and facilities. In 2009 and 2010, the District issued two series of these bonds, in the amount of 34.8 million to fund projects. All Proposition V funds were fully spent prior to the 2019-20 fiscal year.

In November 2014, the voters approved the reauthorization of \$31 million of general obligation bonds with the passage of Proposition V & Measure L. \$2.9 million of Proposition V & Measure L bonds were issued in 2015 (Series A) that provided for district technology purchases. In November 2018, the district issued \$15 million of Proposition V & Measure L, Series B bonds to complete facility projects. In August 2021, the district issued \$13 million of Proposition V & Measure L, Series C bonds to complete facility projects.

**FINANCIAL HIGHLIGHTS**

- The fund balance for Proposition V & Measure L Building Fund is \$1,101,263 as of June 30, 2023.
- The fund balance has decreased by \$3,878,993 as of June 30, 2023, as the District continues to expend bond proceeds to modernize, construct and improve its facilities.
- Revenues consisted of interest earnings only. Revenue totaled \$106,867 as of June 30, 2023 as compared to \$76,897 in June 2022.
- Expenditures as of June 30, 2023 totaled \$3,911,215 as compared to \$13,348,651 in June 2022.

## BALANCE SHEET

The District's Proposition V & Measure L Building Fund balance as of June 30, 2023 was \$1,101,263 (See Table Below).

LAKESIDE UNION SCHOOL DISTRICT  
PROPOSITION V & MEASURE L  
GENERAL OBLIGATION BONDS  
June 30, 2022

	Building Fund		Total % Change
	2021-22	2022-23	
Cash	\$ 7,737,713	\$ 939,114	-87.86%
Accounts Receivable	18,974	16,780	-11.56%
Due from Other Funds	-	1,462,514	-100%
<b>Total Assets</b>	<u>7,756,687</u>	<u>955,894</u>	-87.68%
Accounts Payable	1,649,088	732,420	-55.59%
Due to Other Funds	<u>1,127,343</u>	<u>584,725</u>	-48.13%
<b>Total Liabilities</b>	2,776,431	1,317,145	-52.56%
Fund Balance	<u>4,980,256</u>	<u>1,101,263</u>	-77.89%
<b>Total Liabilities and Fund Balance</b>	<u><u>\$ 7,756,687</u></u>	<u><u>\$ 2,418,408</u></u>	<u>-68.82%</u>

**FUND BALANCE**

The interest income reported represents funds earned on the cash held by the San Diego County Treasurer. The total expenditures of \$3,934,908 are only for Proposition V & Measure L voter authorized expenses (See Table Below).

LAKESIDE UNION SCHOOL DISTRICT  
 PROPOSITION V & MEASURE L  
 GENERAL OBLIGATION BONDS  
 June 30, 2022

	Building Fund		Total % Change
	2021-22	2022-23	
<b>Revenues</b>			
Interest	\$ 52,278	\$ 96,189	84.00%
Fair Market Value Adj	24,619	10,678	100.00%
<b>Total Revenues</b>	<u>76,897</u>	<u>106,867</u>	38.97%
<b>Expenditures</b>			
Classified Salaries	4,733	-	-100.00%
Taxes and Benefits	2,381	-	-100.00%
Professional Services	18,500	23,693	100.00%
Capital Outlay	13,323,037	3,911,215	-70.64%
<b>Total Expenditures</b>	<u>13,348,651</u>	<u>3,934,908</u>	-70.52%
<b>Other Sources</b>			
Bond Issuance	13,100,000	-	100.00%
<b>Total Other Sources</b>	<u>13,100,000</u>	-	100.00%
<b>Net Change in Fund Balance</b>			
	<u>(171,754)</u>	<u>(3,828,041)</u>	<u>2128.79%</u>
<b>Fund Balance - Beginning</b>	<u>11,815,661</u>	<u>11,643,907</u>	<u>-1.45%</u>
<b>Fund Balance - Ending</b>	<u>\$ 11,643,907</u>	<u>\$ 7,815,866</u>	<u>-32.88%</u>

**LONG TERM DEBT**

At the end of the year, Lakeside Union School District had \$63,494,352 in long-term debt outstanding. This is a decrease of \$16,664,972 from the prior year, reflecting the final bond series issuance.

LAKESIDE UNION SCHOOL DISTRICT  
 PROPOSITION V & MEASURE L  
 GENERAL OBLIGATION BONDS  
 June 30, 2022

	Building Fund		Total % Change
	2021-22	2022-23	
<b>General Obligation Bonds Payable</b>			
Bond Premium	\$ 4,937,766	\$ 4,822,214	-2.34%
Principle Balance	72,605,573	73,443,783	1.15%
<b>Total Prop V &amp; Measure L GO Bonds Payable</b>	<b>77,543,339</b>	<b>78,265,997</b>	<b>0.93%</b>

**FACTORS BEARING ON THE DISTRICT'S FUTURE**

At the time these financial statements were prepared and audited, the District was aware of the existing circumstances that could affect its financial health in the future:

- Inflation increases in building costs during construction.

**REQUESTS FOR INFORMATION**

This financial report is designed to provide our citizens, taxpayers, investors, and creditors with a general overview of the District's Proposition V & Measure L Building Fund finances to demonstrate the District's accountability for the funding it receives. Questions concerning any of the information provided in this report or requests for additional financial information should be addressed to the Business Services Department at:

Lakeside Union School District,  
 12335 Woodside Avenue,  
 Lakeside, CA 92040,  
 619-390-2640.

## Financial Statements

**Lakeside Union School District**  
**Proposition V & Measure L Building Fund (21-39)**

Balance Sheet

June 30, 2023

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**Assets:**

Current Assets

Cash in County Treasury	\$ 939,114
Accounts Receivable	16,780
Due From Other Funds	<u>1,462,514</u>
Total Current Assets	<u>2,418,408</u>

Total Assets \$ 2,418,408

**Liabilities and Fund Balance:**

Current Liabilities

Accounts Payable	\$ 732,420
Due to Other Funds	<u>584,725</u>
Total Current Liabilities	<u>1,317,145</u>

Fund Balance

Restricted for Capital Projects	<u>1,101,263</u>
Total Fund Balance	<u>1,101,263</u>

Total Liabilities and Fund Balance \$ 2,418,408

The accompanying notes to the financial statements are an integral part of this statement.

**Lakeside Union School District**  
**Proposition V & Measure L Building Fund (21-39)**

Statement of Revenues, Expenditures, and Changes in Fund Balance  
For the Year Ended June 30, 2023

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<b>Revenues:</b>	
Interest Income	\$ 96,189
Fair Market Value Adjustment	164,245
Other Local Revenue	<u>10,678</u>
Total Revenues	<u>271,112</u>
<b>Expenditures:</b>	
Current Expenditures:	
Professional Services	23,693
Capital Outlay:	
Buildings & Improvements	3,989,028
Equipment	<u>(77,813)</u>
Total Expenditures	<u>3,934,908</u>
Excess of Revenues Over Expenditures	<u>(3,663,796)</u>
<b>Net Change in Fund Balance</b>	<u>(3,663,796)</u>
<b>Fund Balance, Beginning of Year</b>	<u>4,765,059</u>
<b>Fund Balance, End of Year</b>	<u>\$ 1,101,263</u>

The accompanying notes to the financial statements are an integral part of this statement.

# Lakeside Union School District

## Proposition V & Measure L Building Fund (21-39)

Notes to the Financial Statements  
For the Year Ended June 30, 2023

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### A. Summary of Significant Accounting Policies

Lakeside Union School District Proposition V & Measure L Building Fund (21-39), hereinafter referred to as the “Bond Fund”, accounts for its financial transactions in accordance with the policies and procedures of the California Department of Education’s *California School Accounting Manual*. The accounting policies of the District conform to accounting principles generally accepted in the United States of America (GAAP) as prescribed by the Governmental Accounting Standards Board (GASB) and the American Institute of Certified Public Accountants (AICPA).

#### 1. Reporting Entity

The Bond Fund was formed to account for renovation of schools for Lakeside Union School District (District), through expenditures of general obligation bonds issued under Proposition V, authorized by registered voters on November 4, 2008, and Measure L which reauthorized remaining amounts under Proposition V by authorized voters November 4, 2014.

The Bond Fund operates under a locally selected Citizens’ Oversight Committee comprised of seven members formed in accordance with the Local School Construction Bonds Act of 2000, at Section 15264 *et seq.* of the Education Code, Proposition 39. The reporting entity consists only of the Bond Fund of the District. These financial statements are intended to present only the financial position and results of operations of the Bond Fund in conformity with accounting principles generally accepted in the United States of America, and accordingly do not present the financial position and results of operations of the District.

#### 2. Basis of Accounting – Measurement Focus

**Bond Fund.** The bond fund is reported using the current financial resources measurement focus and the modified accrual basis of accounting. Under this method, revenues are recognized when measurable and available. The Bond Fund considers all revenues reported in the fund to be available if the revenues are collected within sixty days after year-end. Revenues from local sources consist primarily of interest earned. Investment earnings are recorded as earned, since they are both measurable and available. Expenditures are recorded when the related fund liability is incurred, except for principal and interest on general long-term debt, claims and judgments, and compensated absences, which are recognized as expenditures to the extent they have matured. General capital asset acquisitions are reported as expenditures in governmental funds. Proceeds from general long-term debt and acquisitions under capital leases are reported as other financing sources.

When the Bond Fund incurs an expenditure or expense for which both restricted and unrestricted resources may be used, it is the Bond Fund’s policy to use restricted resources first, then unrestricted resources.

# Lakeside Union School District

## Proposition V & Measure L Building Fund (21-39)

Notes to the Financial Statements, Continued

June 30, 2023

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### 3. Encumbrances

Encumbrance accounting is used in the Bond Fund to reserve portions of applicable appropriations for which commitments have been made. Encumbrances are recorded for purchase orders, contracts, and other commitments when they are written. Encumbrances are liquidated when the commitments are paid or at year end, whichever is sooner.

### 4. Budgets and Budgetary Accounting

Annual budgets are adopted on a basis consistent with generally accepted accounting principles for the Bond Fund. By state law, the District's governing board must adopt a final budget no later than July 1<sup>st</sup>. A public hearing must be conducted to receive comments prior to adoption. The District's governing board has satisfied these requirements.

These budgets are revised by the District's governing board and district superintendent during the year to give consideration to unanticipated income and expenditures.

Formal budgetary integration was used as a management control device during the year for all budgeted funds. The District employs budget control by minor object and by individual appropriation accounts.

### 5. Revenues and Expenses

#### a. Revenues – Exchange and Non-Exchange

On a modified accrual basis, revenue is recorded in the fiscal year in which the resources are measurable and become available. Available means that the resources will be collected within the current year or expected to be collected soon enough thereafter, to be used to pay liabilities of the current fiscal year. Generally, available is defined as collectible within 60 days. However, to achieve comparability of reporting among California districts and so as to not distort normal revenue patterns, with specific respect to reimbursement grants and corrections to State-aid apportionments, the California Department of Education has defined available for districts as collectible within one year. The following revenue sources are considered to be both measurable and available at fiscal year-end: State apportionments, property taxes, interest, certain grants, and other local sources.

Non-exchange transactions are transactions in which the District receives value without directly giving equal value in return, including property taxes, certain grants, entitlements, and donations. Revenue from property taxes is recognized in the fiscal year in which the taxes are received. Revenue from certain grants, entitlements, and donations are recognized in the fiscal year in which all eligibility requirements have been satisfied. Eligibility requirements include time and purpose restrictions. On a modified accrual basis, revenue from non-exchange transactions must also be available before it can be recognized.

**Lakeside Union School District**  
**Proposition V & Measure L Building Fund (21-39)**

Notes to the Financial Statements, Continued

June 30, 2023

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b. Expenditures

The measurement focus of governmental fund accounting is on decreases in net financial resources (expenditures) rather than expenses. Expenditures are generally recognized in the accounting period in which the related fund liability is incurred, if measurable, and typically paid within 90 days. Principal and interest on long-term obligations, which has not matured, are recognized when paid in the bond fund as expenditures. Allocations of costs, such as depreciation and amortization, are not recognized in the Bond Fund.

6. Assets, Deferred Outflows of Resources, Liabilities, Deferred Inflows of Resources, Fund Balance and Net Position

a. Deposits and Investments

Cash balances held in banks and in revolving funds are insured to \$250,000 by the Federal Depository Insurance Corporation (FDIC). The Bond Fund does not have any cash held in banks or revolving fund. Highly liquid investments are considered to be cash equivalents if they have a maturity of three months or less when purchased.

In accordance with Education Code §41001, the Bond Fund maintains substantially all its cash in the San Diego County Treasury. The county pools these funds with those of other districts in the county and invests the cash. These pooled funds are carried at cost, which approximates market value. Interest earned is deposited quarterly into participating funds. Any investment losses are proportionately shared by all funds in the pool.

The county is authorized to deposit cash and invest excess funds by California Government Code §53648 et seq. The funds maintained by the county are either secured by federal depository insurance or are collateralized.

Information regarding the amount of dollars invested in derivatives with San Diego County Treasury was not available.

b. Interfund Activity

Interfund activity results from loans, services provided, reimbursements or transfers between funds of the District. Loans are reported as interfund receivables and payables as appropriate and are subject to elimination upon consolidation. Services provided, deemed to be at market or near market rates, are treated as revenues and expenditures or expenses. Reimbursements occur when one fund incurs a cost, charges the appropriate benefiting fund and reduces its related cost as a reimbursement. All other interfund transactions are treated as transfers.

# Lakeside Union School District

## Proposition V & Measure L Building Fund (21-39)

Notes to the Financial Statements, Continued

June 30, 2023

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### c. Fund Balances – Governmental Funds

Fund balances of the Bond Fund are classified as follows:

*Nonspendable Fund Balance* represents amounts that cannot be spent because they are either not in spendable form (such as inventory or prepaid items) or legally required to remain intact (such as revolving cash accounts or principal of a permanent fund).

*Restricted Fund Balance* represents amounts that are subject to externally imposed and legally enforceable constraints. Such constraints may be imposed by creditors, grantors, contributors, or laws or regulations, or may be imposed by law through constitutional provisions or enabling legislation.

*Committed Fund Balance* represents amounts that can only be used for a specific purpose because of a formal action by the District's governing board. Committed amounts cannot be used for any other purpose unless the governing board removes those constraints by taking the same type of formal action. Committed fund balance amounts may be used for other purposes with appropriate due process by the governing board. Commitments are typically done through adoption and amendment of the budget or resolution. Committed fund balance amounts differ from restricted balances in that the constraints on their use do not come from outside parties, constitutional provisions, or enabling legislation.

*Assigned Fund Balance* represents amounts which the District intends to use for a specific purpose, but that do not meet the criteria to be classified as restricted or committed. Intent may be stipulated by the governing board or by an official or body to which the governing board delegates the authority. Specific amounts that are not restricted or committed in a special revenue, capital projects, debt service, or permanent fund are assigned for purposes in accordance with the nature of their fund type or the fund's primary purpose. Assignments within the general fund convey that the intended use of those amounts is for a specific purpose that is narrower than the general purposes of the District itself.

*Unassigned Fund Balance* represents amounts which are unconstrained in that they may be spent for any purpose. Only the general fund reports a positive unassigned fund balance. Other governmental funds might report a negative balance in this classification because of overspending for specific purposes for which amounts had been restricted, committed or assigned.

When an expenditure is incurred for a purpose for which both restricted and unrestricted fund balance is available, the District considers restricted funds to have been spent first. When an expenditure is incurred for which committed, assigned, or unassigned fund balances are available, the District considers amounts to have been spent first out of committed funds, then assigned funds, and finally unassigned funds.

### 7. Use of Estimates

The preparation of the financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the amounts reported in the financial statements and accompanying notes. Actual results may differ from those estimates.

**Lakeside Union School District**  
**Proposition V & Measure L Building Fund (21-39)**

Notes to the Financial Statements, Continued  
 June 30, 2023

8. Fair Value Measurements

The Bond Fund categorizes its fair value measurements within the fair value hierarchy established by generally accepted accounting principles as defined by Governmental Accounting Standards Board (GASB) Statement No. 72. The hierarchy is based on the valuation inputs used to measure the fair value of the asset. The hierarchy is detailed as follows:

- Level 1 Inputs: Quoted prices (unadjusted) in active markets for identical assets or liabilities that a government can access at the measurement date.
- Level 2 Inputs: Inputs other than quoted prices included within Level 1 that are observable for an asset or liability, either directly or indirectly.
- Level 3 Inputs: Unobservable inputs to an asset or liability.

9. New Accounting Pronouncements

The District has adopted accounting policies compliant with new pronouncements issued by the Government Accounting Standards Board (GASB) that are effective for the fiscal year ended June 30, 2023. Those newly implemented pronouncements are as follows:

Description	Date Issued
GASB Statement 91, Conduit Debt Obligations	05/2019
GASB Statement 94, Public-Private and Public-Public Partnerships and Availability Payment Arrangements	03/2020
GASB Statement 96, Subscription Based Information Technology Arrangements	05/2020
GASB Statement 99, Omnibus 2022 (Portions related to leases, PPPs, and SBITAs)	04/2022
GASB Implementation Guide 2021-1, Implementation Guidance Update - 2021 (Except Question 5.1)	05/2021

The District has implemented the policies necessary to comply with these pronouncements and implementation guides. The implementation of these items did not result in a change to financial presentation for the Proposition V & Measure L Building Fund (Fund 21-39).

**Lakeside Union School District**  
**Proposition V & Measure L Building Fund (21-39)**

Notes to the Financial Statements, Continued  
 June 30, 2023

**B. Compliance and Accountability**

1. Finance Related Legal and Contractual Provisions

In accordance with GASB Statement No. 38, “Certain Financial Statement Note Disclosures”, violations of finance-related legal and contractual provisions, if any are reported below, along with actions taken to address such violations:

<u>Violation</u>	<u>Action Taken</u>
None Reported	Not Applicable

2. Deficit Fund Balance or Fund Net Position of Individual Funds

The following funds are funds having deficit fund balances or fund net position at year end, if any, along with remarks which address such deficits:

<u>Fund Name</u>	<u>Deficit</u>	
	<u>Amount</u>	<u>Remarks</u>
None	Not Applicable	Not Applicable

**C. Fair Value Measurements**

The Bond Fund’s investments at June 30, 2023, categorized within the fair value hierarchy established by generally accepted accounting principles, were as follows:

	<u>Amount</u>	<u>Fair Value Measurement Using</u>		
		<u>Quoted Prices in Active Markets for Identical Assets (Level 1)</u>	<u>Significant Other Observable Inputs (Level 2)</u>	<u>Significant Unobservable Inputs (Level 3)</u>
External investment pools measured at fair value				
San Diego County Treasury	\$ 939,114	\$ -	\$ 939,114	\$ -
Total investments by fair value level	<u>\$ 939,114</u>	<u>\$ -</u>	<u>\$ 939,114</u>	<u>\$ -</u>

The Bond Fund is considered to be an involuntary participant in an external investment pool as the Bond Fund is required to deposit all receipts and collections of monies with their County Treasurer (Education Code §41001). The fair value of the Bond Fund’s investments in the pool is reported in the accounting financial statements as amounts based upon the District’s pro-rata share of the fair value provided by the County Treasurer for the entire portfolio (in relation to the amortized cost of the portfolio). The balance available for withdrawal is based on the accounting records maintained by the County Treasurer, which is recorded on the amortized cost basis.

The San Diego County Treasury is not registered with the Securities and Exchange Commission (SEC) as an investment company; however, the County Treasury acts in accordance with investment policies monitored by a Treasury Oversight Committee consisting of members appointed by participants in the investment pool and up to five members of the public having expertise, or an academic background in, public finance. In addition, the County Treasury is audited annually by an independent auditor.

**Lakeside Union School District**  
**Proposition V & Measure L Building Fund (21-39)**

Notes to the Financial Statements, Continued  
 June 30, 2023

**D. Cash and Investments**

1. Cash in County Treasury

In accordance with Education Code §41001, the Bond Fund maintains substantially all of its cash in the San Diego County Treasury as part of the common investment pool (\$965,447 as of June 30, 2023). The fair value of the Bond Fund’s portion of this pool as of that date, as provided by the pool sponsor, was \$939,114. Assumptions made in determining the fair value of the pooled investment portfolios are available from the County Treasurer.

2. Investments Authorized by the California Government Code and the District’s Investment Policy

The table below identifies the investment types that are authorized for the Bond Fund by the California Government Code (or the Bond Fund’s investment policy, where more restrictive). The table also identifies certain provisions of the California Government Code (or the Bond Fund’s investment policy where more restrictive) that address interest rate risk, credit risk, and concentration of credit risk. This table does not address investments of debt proceeds held by bond trustee that are governed by the provisions of debt agreements of the Bond Fund, rather than the general provisions of the California Government Code or the District’s investment policy.

<u>Authorized Investment Type</u>	<u>Maximum Remaining Maturity</u>	<u>Maximum Percentage of Portfolio</u>	<u>Maximum Investment in One Issuer</u>
Local Agency Bonds, Notes, Warrants	5 Years	None	None
Registered State Bonds, Notes, Warrants	5 Years	None	None
U.S. Treasury Obligations	5 Years	None	None
U.S. Agency Securities	5 Years	None	None
Banker's Acceptance	180 Days	40%	30%
Commercial Paper	270 Days	25%	10%
Negotiable Certificates of Deposit	5 Years	30%	None
Repurchase Agreements	1 Year	None	None
Reverse Repurchase Agreements	92 Days	20% of Base	None
Medium-Term Corporate notes	5 Years	30%	None
Mutual Funds	N/A	20%	10%
Money Market Mutual Funds	N/A	20%	10%
Mortgage Pass-Through Securities	5 Years	20%	None
County Pooled Investment Funds	N/A	None	None
Local Agency Investment Fund	N/A	None	None
Joint Powers Authority Pools	N/A	None	None

**Lakeside Union School District**  
**Proposition V & Measure L Building Fund (21-39)**

Notes to the Financial Statements, Continued  
 June 30, 2023

3. Analysis of Specific Deposit and Investment Risks

GASB Statement No. 40 requires a determination as to whether the Bond Fund was exposed to the following specific investment risks at year end and if so, the reporting of certain related disclosures:

a. Credit Risk

Credit risk is the risk that an issuer or other counterparty to an investment will not fulfill its obligations. The county treasury is restricted by Government Code §53635 pursuant to §53601 to invest only in time deposits, U.S. government securities, state registered warrants, notes or bonds, State Treasurer’s investment pool, bankers’ acceptances, commercial paper, negotiable certificates of deposit, and repurchase or reverse repurchase agreements. The ratings of securities by nationally recognized rating agencies are designed to give an indication of risk.

At June 30, 2023, credit risk for the Bond Fund’s investments was as follows:

<u>Investment Type</u>	<u>Rating</u>	<u>Rating Agency</u>	<u>Amount</u>
County Treasurer’s Investment Pool	Unrated	Not Applicable	\$ 939,114

b. Custodial Credit Risk

Deposits are exposed to custodial credit risk if they are not covered by depository insurance and the deposits are uncollateralized, collateralized with securities held by the pledging financial institution, or collateralized with securities held by the pledging financial institution’s trust department or agent but not in the Bond Fund’s name. The California Government Code and the Bond Fund’s investment policy do not contain legal or policy requirements that would limit the exposure to custodial credit risk for deposits, other than the following provision for deposits: The California Government Code requires that a financial institution secure deposits made by state or local governmental units by pledging securities in an undivided collateral pool held by a depository regulated under state law (unless so waived by the governmental unit). The market value of the pledged securities in the collateral pool must equal at least 110% of the total amount deposited by the public agencies. California law also allows financial institutions to secure deposits by pledging first trust deed mortgage notes having a value of 150% of the secured public deposits.

Investment securities are exposed to custodial credit risk if the securities are uninsured, are not registered in the name of the government, and are held by either the counterparty or the counterparty’s trust department or agent but not in the Bond Fund’s name.

At June 30, 2023, the Bond Fund was not exposed to custodial credit risk.

**Lakeside Union School District**  
**Proposition V & Measure L Building Fund (21-39)**

Notes to the Financial Statements, Continued

June 30, 2023

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c. Concentration of Credit Risk

This risk is the risk of loss attributed to the magnitude of a government's investment in a single issuer. The investment policy of the Bond Fund contains no limitations on the amount that can be invested in any one issuer beyond the amount stipulated by the California Government Code. Investments in any one issuer that represent five percent or more of the total investments are either an external investment pool and are therefore exempt. As such, the Bond Fund was not exposed to concentration of credit risk.

d. Interest Rate Risk

This is the risk that changes in interest rates will adversely affect the fair value of an investment. Generally, the longer the maturity of an investment, the greater the sensitivity of its fair value to changes in market interest rates. The Bond Fund maintains pooled investments with the San Diego County Treasury with a fair value of \$939,114. The average weighted maturity for this pool was 438 days at June 30, 2023.

e. Foreign Currency Risk

This is the risk that exchange rates will adversely affect the fair value of an investment. At year end, the Bond Fund was not exposed to foreign currency risk.

4. Investment Accounting Policy

The Bond Fund is required by GASB Statement No. 31 to disclose its policy for determining which investments, if any, are reported at amortized cost. The Bond Fund's general policy is to report money market investments and short-term participating interest-earning investment contracts at amortized cost and to report nonparticipating interest-earning investment contracts using a cost-based measure. However, if the fair value of an investment is significantly affected by the impairment of the credit standing of the issuer or by other factors, it is reported at fair value. All other investments are reported at fair value unless a legal contract exists which guarantees a higher value. The term "short-term" refers to investments which have a remaining term of one year or less at time of purchase. The term "nonparticipating" means that the investment's value does not vary with market interest rate changes. Nonnegotiable certificates of deposit are examples of nonparticipating interest-earning investment contracts.

The Bond Fund's investments in external investment pools are reported at an amount determined by the fair value per share of the pool's underlying portfolio, unless the pool is a 2a7-like, in which case they are reported at share value. A 2a7-like pool is one which is not registered with the Securities and Exchange Commission (SEC) as an investment company, but nevertheless has a policy that it will, and does, operate in a manner consistent with the SEC's Rule 2a7 of the Investment Company Act of 1940.

**Lakeside Union School District**  
**Proposition V & Measure L Building Fund (21-39)**

Notes to the Financial Statements, Continued

June 30, 2023

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**E. Accounts Receivable**

There are no significant receivables which are not scheduled for collection within one year of year end. Accounts receivable balances as of June 30, 2023 consisted of:

Local Sources	
Interest	\$ 16,780
Total Accounts Receivable	<u>\$ 16,780</u>

**F. Accounts Payable**

Accounts payable balances as of June 30, 2023 consisted of:

Vendors Payable	\$ 732,420
Total Accounts Payable	<u>\$ 732,420</u>

**G. Short Term Debt Activity**

The Bond Fund accounts for short-term debts for maintenance purposes through the General Fund. The proceeds from loans are shown in the financial statements as other financing sources. The Bond Fund did not issue any short-term debt during the fiscal year ended June 30, 2023.

**H. General Obligation Bonds**

The Bond Fund's bonded debt consists of various issues of general obligation bonds that are generally callable with interest payable semiannually. Bond proceeds pay primarily for acquiring or constructing capital facilities. The Bond Fund repays general obligation bonds from voter-approved property taxes which are collected by the County Treasurer and deposited into the Bond Interest and Redemption Fund, which is not included in this report.

On November 4, 2008, registered voters authorized the issuance of \$79,550,000 principal amount of general obligation bonds under Proposition V. On November 4, 2014, registered voters re-authorized \$31,000,000 principal amount of general obligation bonds under Measure L. Of the amounts authorized and allowed by law, the final \$13,100,000 under Measure L was issued August 5, 2021.

**Lakeside Union School District**  
**Proposition V & Measure L Building Fund (21-39)**

Notes to the Financial Statements, Continued

June 30, 2023

General obligation bonds at June 30, 2023 consisted of the following:

	<u>Date of Issue</u>	<u>Interest Rate</u>	<u>Maturity Date</u>	<u>Amount of</u>
2008 Election, Series A	04/23/09	3.00 - 6.03%	08/01/33	\$ 21,833,149
2008 Election, Series B	10/07/10	6.14 - 6.49%	08/01/50	12,982,209
2015 Refunding Bonds	06/09/15	2.00 - 4.00%	08/01/35	6,185,000
2016 Refunding Bonds	11/02/16	2.00 - 5.00%	08/01/33	17,815,000
2014 Election, Series B	11/15/18	4.00 - 5.75%	08/01/45	15,000,000
2014 Election, Series C	08/05/21	4.00%	08/01/41	13,100,000
Total				<u>\$ 86,915,358</u>

	<u>Beginning Balance</u>	<u>Increases</u>	<u>Decreases</u>	<u>Ending Balance</u>	<u>Due Within One Year</u>
2008 Election, Series A					
Principal	\$ 1,783,149	\$ -	\$ -	\$ 1,783,149	\$ -
Premium	51,687	-	-	51,687	-
Accreted Interest	3,002,623	412,750	-	3,415,373	-
2008 Election, Series B					
Principal	10,690,031	-	-	10,690,031	-
Premium	278,929	-	-	278,929	-
Accreted Interest	11,119,770	1,420,460	-	12,540,230	-
2015 Refunding Bonds					
Principal	5,650,000	-	85,000	5,565,000	50,000
Discount	(73,406)	-	(1,104)	(72,302)	(650)
2016 Refunding Bonds					
Principal	16,445,000	-	690,000	15,755,000	895,000
Premium	1,788,856	-	75,057	1,713,799	97,356
2014 Election Series B					
Principal	13,015,000	-	-	13,015,000	60,000
Premium	830,683	-	-	830,683	3,830
2014 Election Series C					
Principal	10,900,000	-	220,000	10,680,000	195,000
Premium	2,061,017	-	41,599	2,019,418	36,871
Total	<u>\$ 77,543,339</u>	<u>\$ 1,833,210</u>	<u>\$ 1,110,552</u>	<u>\$ 78,265,997</u>	<u>\$ 1,337,407</u>

**Lakeside Union School District**  
**Proposition V & Measure L Building Fund (21-39)**

Notes to the Financial Statements, Continued  
 June 30, 2023

The annual requirements to amortize the bonds outstanding at June 30, 2023 are as follows:

Year Ended June 30,	Principal	Interest	Accreted Interest	Total
2024	1,200,000	1,806,794	-	\$ 3,006,794
2025	1,080,152	1,767,744	819,948	3,667,844
2026	1,184,216	1,745,469	995,784	3,925,469
2027	886,318	1,719,944	1,558,682	4,164,944
2028	922,463	1,690,944	1,787,537	4,400,944
2029-2033	18,500,000	6,573,523	-	25,073,523
2034-2038	14,641,025	3,321,002	12,848,975	30,811,002
2039-2043	11,192,143	1,528,950	17,421,455	30,142,548
20244-2048	5,998,520	227,300	19,349,534	25,575,354
2049-2053	1,883,343	-	20,619,946	22,503,289
Total	<u>\$ 57,488,180</u>	<u>\$ 20,381,670</u>	<u>\$ 75,401,861</u>	<u>\$ 153,271,711</u>

*Premium/Discount*

Bond premium arises when the market rate of interest is higher than the stated interest rate on the bond. Bond discount arises when the market rate of interest is lower than the stated interest rate on the bond. Generally Accepted Accounting Principles (GAAP) require that the premium increase the face value of the bond and the discount decrease the face value of the bond. The premium and discount are then amortized over the life of the bond using the economic interest method.

Effective interest on general obligation bonds issued at a premium/discount are as follows:

	2008 Election Series A	2008 Election Series B	2015 Refunding
Total Interest Payments	\$ 23,929,697	\$ 79,073,622	\$ 3,328,219
Bond (Premium)/Discount	(846,769)	(338,737)	80,353
Net Interest Payments	<u>23,082,928</u>	<u>78,734,885</u>	<u>3,408,572</u>
PAR Amount of Bonds	21,833,149	12,982,209	6,185,000
Periods	21	38	20
Effective Interest Rate	5.03%	15.96%	2.76%
	2016 Refunding	2014 Election Series B	2014 Election Series C
Total Interest Payments	\$ 8,717,336	\$ 11,652,125	\$ 5,760,057
Bond (Premium)/Discount	(1,937,882)	(957,376)	(2,477,002)
Net Interest Payments	<u>6,779,454</u>	<u>10,694,749</u>	<u>3,283,055</u>
PAR Amount of Bonds	17,815,000	15,000,000	13,100,000
Periods	15	26	20
Effective Interest Rate	2.54%	2.74%	1.25%

**Lakeside Union School District**  
**Proposition V & Measure L Building Fund (21-39)**

Notes to the Financial Statements, Continued  
 June 30, 2023

**I. Commitments and Contingencies**

1. Litigation

The District is involved in various litigation arising from the normal course of business. In the opinion of management and legal counsel, the disposition of all litigation pending is not expected to have a material adverse effect on the overall financial position of the Bond Fund as of June 30, 2023.

2. Construction Commitments

As of June 30, 2023, the Bond Fund had the following construction project it was working on

Construction in Process:	Commitment	*Expected Date of Final Completion
District Wide Energy Project	2,500,000	June 2024

\* Expected Date of final completion subject to change

**J. Upcoming Accounting Guidance**

The Governmental Accounting Standards Board (GASB) issues pronouncements and additional guidance for governmental agencies to establish consistent accounting across all governments in the United States. The following table represents items that have been issued by GASB that will become effective in future periods:

Description	Date Issued	Fiscal Year Effective
GASB Statement 99, Omnibus 2022 (Portions related to financial guarantees and derivative instruments)	04/2022	2024-25
GASB Statement 100, Accounting Changes for Error Corrections	06/2022	2024-25
GASB Statement 101, Compensated Absences	06/2022	2024-25
GASB Implementation Guide 2021-1, Implementation Guidance Update - 2021 (Question 5.1)	05/2021	2024-25
GASB Implementation Guide 2023-1, Implementation Guidance Update - 2023	06/2023	2024-25

The effects of the upcoming guidance and pronouncements on the Bond Fund’s financial statements has not yet been determined.

## Other Independent Auditors' Reports

Independent Auditor's Report on Internal Control Over Financial Reporting and  
on Compliance and Other Matters Based on an Audit of Financial Statements  
Performed in Accordance with *Government Auditing Standards*

To the Citizens' Oversight Committee  
Lakeside Union School District  
Proposition V & Measure L Building Fund (21-39)  
Lakeside, California

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of the Lakeside Union School Bond Fund Proposition V & Measure L Building Fund (Bond Fund), which comprise the Balance Sheet and Statement of Revenues, Expenditures, and Changes in Fund Balance as of and for the year ended June 30, 2023, and the related notes to the financial statements, which collectively comprise Lakeside Union School Bond Fund Proposition V & Measure L Building Fund's basic financial statements, and have issued our report thereon dated March 20, 2024.

**Internal Control over Financial Reporting**

In planning and performing our audit of the financial statements, we considered Lakeside Union School Bond Fund Proposition V & Measure L Building Fund's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of Lakeside Union School Bond Fund Proposition V & Measure L Building Fund's internal control. Accordingly, we do not express an opinion on the effectiveness of Lakeside Union School Bond Fund Proposition V & Measure L Building Fund's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been detected.

**Compliance and Other Matters**

As part of obtaining reasonable assurance about whether Lakeside Union School Bond Fund Proposition V & Measure L Building Fund's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

## Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Bond Fund's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Bond Fund's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.



El Cajon, California  
March 20, 2024

## Independent Auditor's Report on Performance

To the Citizens' Oversight Committee  
Lakeside Union School District  
Proposition V & Measure L Building Fund (21-39)  
Lakeside, California

We were engaged to conduct a performance audit of the Lakeside Union School District Proposition V & Measure L Building Fund (21-39), herein after referred to as the Bond Fund, for the year ended June 30, 2023.

### **Management's Responsibility for Performance Compliance**

Our audit was limited to the objectives listed with the report which includes the District's compliance with the performance requirements as referred to in Proposition 39 and outlined in Article XIII A, Section 1(b)(3)(C) of the California Constitution. Management is responsible for the District's compliance with those requirements.

### **Auditor's Responsibility**

Our responsibility is to express an opinion on performance based on our audit. We conducted this performance audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to performance audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States and the *Appendix A of the 2022-23 Guide for Annual Audits of K-12 Local Education Agencies*. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our conclusions based on our audit objectives.

In planning and performing our performance audit, we obtained an understanding of the District's internal controls over the Bond Fund and related construction projects in order to determine if the internal controls were adequate to help ensure the District's compliance with the requirements of Proposition 39, but not for the purpose of expressing an opinion on the effectiveness of the Bond Fund's internal control. Accordingly, we do not express an opinion on the effectiveness of the Bond Fund's internal control.

We believe the audit evidence we have obtained is sufficient and appropriate to provide a reasonable basis for our findings and conclusions based upon the audit objectives.

## **Objectives, Scope, & Methodology of the Audit**

In connection with our performance audit, we performed an audit for compliance as required in the performance requirements set forth in Proposition V and Measure L as approved by registered voters for the fiscal year ended June 30, 2023. The objective of the audit of compliance applicable to the Bond Fund is to determine with reasonable assurance that:

- The proceeds from the sale of Proposition V and Measure L General Obligation Bonds were only used for the purposes set forth in the ballot measure and not for any other purpose, such as teacher and administrative salaries.
- The Governing Board of the Lakeside Union School District (District), in establishing approved projects set forth in the ballot measure to modernize, replace, renovate, construct, acquire, equip, furnish and otherwise improve facilities of the District as noted in the bond project list.

In performing our audit of compliance, we performed procedures including but not limited to those listed as follows:

### **Internal Control Evaluation**

#### Procedure Performed

Inquiries were made of management regarding internal controls to:

- Prevent fraud, waste, or abuse regarding project resources
- Prevent material misstatement in the project funds
- Ensure all expenditures are properly allocated
- Ensure adequate separation of duties exists in the accounting of project funds. All purchase requisitions are reviewed for proper supporting documentation. The Project Manager or appropriate District employee submits back up information to the business office to initiate a purchase requisition. The Project Manager, Superintendent, and Business Manager verifies that the requested purchase is an allowable project cost in accordance with the grant agreement.

#### Results of Procedure Performed

The results of our audit determined the internal control procedures as designed are sufficient to meet the financial and compliance objectives required by generally accepted accounting principles and applicable laws and regulations.

#### Procedure Performed

Tests of controls were performed based on identified controls from procedures above, utilizing samples of expenditures with a sample size sufficient for a high level of assurance, to determine if internal controls as designed are properly implemented and in place over the Bond Fund expenditures.

#### Results of Procedure Performed

The results of our audit determined that the internal controls as designed were properly implemented during the 2022-23 fiscal year.

## **Tests of Expenditures**

### Procedures Performed

We tested expenditures to determine whether Proposition V and Measure L proceeds were spent solely on voter and Board approved school facilities projects as set forth in the bond Projects List and language of the Proposition V and Measure L ballot measure language. Our testing was performed using a sample size sufficient to meet a high level of assurance.

### Results of Procedures Performed

Expenditures tested were found to be in compliance with the terms of the Proposition V and Measure L ballot measure as well as applicable state laws and regulations.

## **Tests of Contracts and Bid Procedures**

### Procedures Performed

We tested expenditures under Proposition V and Measure L to determine if the expenditure was part of a valid contract, that the contract was properly approved by the District's Governing Board, and that the contract was established in compliance with Public Contract Code provisions, including bid procedures. Our testing was performed using a sample size sufficient to meet a high level of assurance.

### Results of Procedures Performed

Expenditures tested were found to have valid contracts which were issued through proper approval of the District's Governing Board in compliance with Public Contract Code, including bid procedures.

## **Facilities Site Review**

### Procedures Performed

We reviewed the Independent Citizens' Oversight Committee minutes and agendas along with other pertinent information on Proposition V and Measure L designated projects to determine whether the funds expended for the year ended June 30, 2023 were for valid facilities acquisition and construction purposes as stated in the Bond Project List. Additionally, we reviewed photographs of significant bond projects to determine projects were being completed as identified in the Bond Project List.

### Results of Procedures Performed

Based on review of the minutes and agenda of the Independent Citizens' Oversight Committee, expenditure documentation, review of project photographs, and other pertinent information provided, it appears the construction work performed was consistent with the Bond Project List as well as the allowable projects as identified in Proposition V and Measure L ballot measures.

## **Citizens' Oversight Committee**

### Procedures Performed

We reviewed the minutes of the Citizens' Oversight Committee meetings to verify compliance with Education Code Section 15278 which requires the Citizens' Oversight Committee to:

- Actively review and report on the proper expenditure of taxpayers' money for school construction.
- Advise the public as to whether the District is in compliance with paragraph (3) of subdivision (b) of Section 1 of Article XIII A of the California Constitution.
- Ensure that bond revenues are expended only for purposes described in paragraph (3) of subdivision (b) of Section 1 of Article XIII A of the California Constitution.
- Ensure that no funds are used for any teacher or administrative salaries or other school operating expenses.

Additionally, Education Code Section 15278 authorizes the Citizens' Oversight Committee to:

- Receive and review copies of the annual, independent performance audit.
- Inspect school facilities and grounds to ensure that bond revenues are expended in compliance with the requirements described in paragraph (3) of subdivision (b) of Section 1 of Article XIII A of the California Constitution.
- Receive and review copies of any deferred maintenance proposals or plans developed by the District.
- Review efforts by the District to maximize bond revenues by implementing cost saving measures.

### Results of Procedures Performed

In our review of the minutes of the Citizens' Oversight Committee we determined that, during the fiscal year ended June 30, 2023 the Committee fulfilled all required responsibilities identified in Education Code Section 15278 and additionally performed other authorized activities as identified in Education Code Section 15278.

### Procedure Performed

We reviewed composition of the Citizens' Oversight Committee to verify compliance with Education Code Section 15282 which requires the following:

- The Citizen's Oversight Committee shall consist of at least seven members who shall serve for a minimum term of two years without compensation and for no more than three consecutive terms.
- One member shall be active in a business organization representing the business community located within the school district boundaries.
- One member shall be active in a senior citizens' organization.
- One member shall be active in a bona fide taxpayers' organization.
- One member shall be the parent or guardian of a child enrolled in the school district.
- One member shall be both a parent or guardian of a child enrolled in the school district and active in a parent-teacher organization.
- An employee or official of the school district shall not be appointed to the citizens' oversight committee.
- A vendor, contractor, or consultant of the school district shall not be appointed to the citizens' oversight committee.

### Results of Procedures Performed

In our review of the Citizens' Oversight Committee composition for the fiscal year ended June 30, 2023 we determined that the Committee was in compliance with Education Code Section 15282.

## **Opinion on Performance**

The results of our tests indicated that the District has complied with the requirements set forth in Proposition V, approved by voters on November 4, 2008, and Measure L, approved by voters on November 4, 2014, in accordance with Proposition 39 as outlined in Article XIII A, Section 1(b)(3)(c) of the California Constitution.

## **Purpose of the Report**

This report is intended solely for the information and use of the District's Governing Board, the Proposition V and Measure L Citizens' Oversight Committee, management, and others within the District and is not intended to be and should not be used by anyone other than these specified parties.

*Wilkinson Hadley King & Co. LLP*

El Cajon, California  
March 20, 2024

## Auditor's Results, Findings & Recommendations

**Lakeside Union School Bond Fund  
 Proposition V & Measure L Building Fund (21-39)**

Schedule of Auditor's Results  
 Year Ended June 30, 2023

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**FINANCIAL STATEMENTS**

Type of auditor's report issued:	<u>Unmodified</u>	
Internal control over financial reporting:		
One or more material weakness(es) identified?	_____ Yes	_____ <u>X</u> No
One or more significant deficiencies identified that are not considered material weakness(es)?	_____ Yes	_____ <u>X</u> No
Noncompliance material to financial statements noted?	_____ Yes	_____ <u>X</u> No

**PERFORMANCE AUDIT**

Any audit findings disclosed that are required to be reported in accordance with <i>2022-23 Guide for Annual Audits      of California K-12 Local Education Agencies</i> or Proposition 39?	_____ Yes	_____ <u>X</u> No
-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-----------	-------------------

# Lakeside Union School Bond Fund Proposition V & Measure L Building Fund

## Schedule of Findings and Questioned Costs

Year Ended June 30, 2023

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Findings represent significant deficiencies, material weaknesses, and/or instances of noncompliance related to the financial statements or performance audit that are required to be reported in accordance with *Government Auditing Standards*, or *Appendix A of the 2022-23 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*.

### **A. Financial Statement Findings**

None

### **B. Performance Audit Findings**

None

**Lakeside Union School Bond Fund  
Proposition V & Measure L Building Fund (21-39)**

Schedule of Prior Year Audit Findings  
Year Ended June 30, 2023

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Finding/Recommendation	Status	Explanation if Not Implemented
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There were no audit findings reported in the prior year audit.



## Memorandum of Understanding

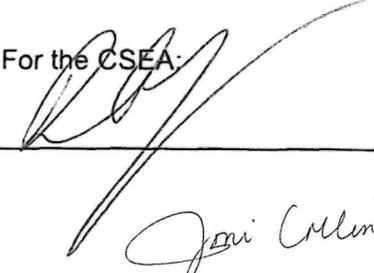
By and Between the California School Employees Association  
And its Lakeside Chapter # 240  
And the Lakeside Union School District

February 2024

The California School Employees Association and its Lakeside Chapter #240 (CSEA) and the Lakeside Union School District (District) enter into this Memorandum of Understanding ("MOU") having agreed to the following:

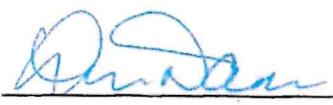
1. The 2024-2025 calendar, a copy of which is attached and incorporated by reference; and
2. Whereas Friday Nov. 1st, 2024 is a non-school day, 11-month and 12-month employees have the option to work or take a vacation day.
3. Whereas January 3, 2025 is a non-work day for all employees in the district,
4. Whereas Monday April 21, 2025 is a non-school day, 11-month and 12-month employees have the option to work or take a vacation day,
5. The District office will be closed December 23, 2024 and December 27, 2024, and the 12-month classified employees will have the option to work or take a vacation day; and
6. The MOU is effective for the 2024-2025 school year.

For the CSEA:

  
\_\_\_\_\_  
Date 3-7-24

  
\_\_\_\_\_  
Date 3/8/24

For the Lakeside Union School District:

  
\_\_\_\_\_  
Date 2-2-24

Employee	Work Days	Holidays	Mandatory	Total Contracted
12 month	244	16	N/A	260
11 month	206	15	10	231
10.5 month	199	15	10	224
10 month	181	14	10	205
10.5 month -SPED Infant	201	16	10	227
ESS 10 month	181	14	10	205

2024-25 Classified Work Calendar

July 2024																																						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S				
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31							
	1	2	3	Fourth of July	4			5	6	7	8	9			10	11	12	13	14			15	16	17	18	19			20	21	22							
	1	2	3			4			5	6	7	8	9																									

August 2024																																					
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S			
				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30				
				23	24			25	26	27	28	29			30	31	32	33	34			35	36	37	38	39			40	41	42	43	44				
				2	3			4	5	6	7	8			9	10	11	12	13			14	15	16	17	18			19	20	21	22	23				
								1	2	3	4	5			6	7	8	9	10			11	12	13	14	15			16	17	18	19	20				
																						1	2	3	4	5			6	7	8	9	10				
																						10	11	12	13	14			15	16	17	18	19				
																						1	2	3	4	5			6	7	8	9	10				





March 2025

S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S									
						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31							
								162	163	164	165	166			167	168	169	170	171			172	173	174	175	176			177	178	179	180	181			182							
								134	135	136	137	138			139	140	141	142	143			144	145	146	147	148			149	150	151	152	153			154							
								130	131	132	133	134			135	136	137	138	139			140	141	142	143	144			145	146	147	148	149			150							
								120	121	122	123	124			125	126	127	128	129			130	131	132	133	134			135	136	137	138	139			140							
								129	130	131	132	133			134	135	136	137	138			139	140	141	142	143			144	145	146	147	148			149							
								120	121	122	123	124			125	126	127	128	129			130	131	132	133	134			135	136	137	138	139			140							

April 2025

S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S										
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30													
		183	184	185	186			187	188	189	190	191			192	193	194	195	Local Holiday			196	197	198	199	200			201	202	203													
		155	156	157	158			V	V	V	V	V			V	V	NW	NW				159	160	161	162	163			164	165	166													
		151	152	153	154			V	V	V	V	V			V	V	NW	NW				NW	155	156	157	158			159	160	161													
		141	142	143	144			V	V	V	V	V			V	V	NW	NW				NW	145	146	147	148			149	150	151													
		150	151	152	153			V	V	V	V	V			V	V	NW	NW				NW	154	155	156	157			158	159	160													
		141	142	143	144			V	V	V	V	V			V	V	NW	NW				NW	145	146	147	148			149	150	151													
								4	5	6	7	8			9	10			14																									

May 2025

S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S										
				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31										
				204	205			206	207	208	209	210			211	212	213	214	215			216	217	218	219	220			Memorial Day	221	222	223	224											
				167	168			169	170	171	172	173			174	175	176	177	178			179	180	181	182	183				184	185	186	187											
				162	163			164	165	166	167	168			169	170	171	172	173			174	175	176	177	178				179	180	181	182											
				152	153			154	155	156	157	158			159	160	161	162	163			164	165	166	167	168				169	170	171	172											
				161	162			163	164	165	166	167			168	169	170	171	172			173	174	175	176	177				178	179	180	181											
				152	153			154	155	156	157	158			159	160	161	162	163			164	165	166	167	168				169	170	171	172											

June 2025																																				
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S		
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30							
	225	226	227	228	229			230	231	232	233	234			235	236	237		238			239	240	241	242	243			244							
	188	189	190	191	192			193	194	195	196	197			198	199	200		201			202	203	204	205	206										
	183	184	185	186	187			188	189	190	191	192			193	194	195		196			197	198	199												
	173	174	175	176	177			178	179	180	181																									
	182	183	184	185	186			187	188	189	190	191			192	193	194		195			196	197	198	199	200			201							
	173	174	175	176	177			178	179	180	181																									

# LAKESIDE UNION SCHOOL DISTRICT

---

**Governing Board Meeting Date:** April 11, 2024

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**Agenda Item:**

Claim against the District for windshield damage.

**Background (Describe purpose/rationale of the agenda item):**

It is recommended that the District Deny/Reject the claim for windshield damage.

**Fiscal Impact (Cost):**

\$0.00

**Funding Source:**

N/A

**Addresses Emphasis Goal(s):**

#1: Academic Achievement       #2: Social Emotional       #3: Physical Environments

**Recommended Action:**

- |                                        |                                                                 |
|----------------------------------------|-----------------------------------------------------------------|
| <input type="checkbox"/> Informational | <input checked="" type="checkbox"/> Denial/Rejection            |
| <input type="checkbox"/> Discussion    | <input type="checkbox"/> Ratification                           |
| <input type="checkbox"/> Approval      | <input type="checkbox"/> Explanation: Click here to enter text. |
| <input type="checkbox"/> Adoption      |                                                                 |

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**Originating Department/School:** Business Services

**Submitted/Recommended By:**



**Lisa Davis, Assistant Superintendent**

**Approved for Submission to the Governing Board:**



**Dr. Rhonda Taylor, Superintendent**

**Reviewed by Cabinet Member** \_\_\_\_\_

# LAKESIDE UNION SCHOOL DISTRICT

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**Governing Board Meeting Date:** April 11, 2024

**Agenda Item:**

March PTA Donation Summary

**Background (Describe purpose/rationale of the agenda item):**

**Fiscal Impact (Cost):**

**Funding Source:**

**Addresses Emphasis Goal(s):**

- #1: Academic Achievement       #2: Social Emotional       #3: Physical Environments

**Recommended Action:**

- Informational**                       **Denial/Rejection**  
 **Discussion**                       **Ratification**  
 **Approval**                       **Explanation:** [Click here to enter text.](#)  
 **Adoption**

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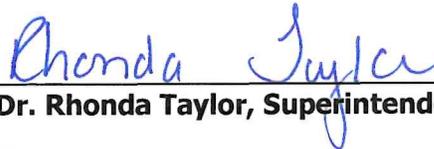
**Originating Department/School:** Business Services

**Submitted/Recommended By:**



**Lisa Davis, Assistant Superintendent**

**Approved for Submission to the Governing Board:**



**Dr. Rhonda Taylor, Superintendent**

**Reviewed by Cabinet Member**

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**2023-24 PTA Donation Summary Report**

School Site	Description	Aug -Sept \$	Oct \$	Nov \$	Dec \$	Jan \$	Feb \$	Mar \$	Apr \$	May \$	June \$	Total Annual Donation
Lakeside Farms	BizTown Admission							\$ 646.00				\$ 646.00
Lakeview	M&O needs, Megaphones, Biz Town Busing					\$ 3,126.55						\$ 3,126.55
Lakeside Middle School	6th Grade Camp			\$ 2,690.00								\$ 2,690.00
	From PTA Council for 6th Grade Camp						\$ 900.00					
Lemon Crest												\$ -
Lindo Park	To Donation Acct Mat'ls & Supplies						\$ 2,000.00					\$ 2,000.00
Riverview	New Laminator	\$ 3,151.00										\$ 3,151.00
	Raz Kids, BMX Red Ribbon Assembly, Playground Coordinator			\$ 15,347.00								\$ 15,347.00
	BizTown Admission						\$ 4,196.00					\$ 4,196.00
	4th Gr. FT Living Coast						\$ 1,820.00					\$ 1,820.00
	5th Gr. FT Sea World						\$ 1,708.00					\$ 1,708.00
Tierra Del Sol	5 Star Program/Shop & Art	\$ 2,650.00				\$ 1,086.00						\$ 3,736.00
	From PTA Council for 6th Grade Camp						\$ 900.00					
Wintergardens	Book Vending Machine	\$ 6,840.00										\$ 6,840.00
	Field Trip - FUNbelievable		\$ 716.00									\$ 716.00
	Field Trip - OMA'S (Tickets/Transp)	\$ 2,225.00		\$ 390.00				\$ 325.00				\$ 2,940.00
	Vent Install - M&O	\$ 34.19										\$ 34.19
	Playground Coordinator				\$ 7,097.00							\$ 7,097.00
	Fall Festival Shuttle Bus to RV						\$ 682.50					
	Field Trip Transportation Charges- SD Zoo							\$ 1,125.00				
	Jog-a-Thon (Nov) Shuttle to RV							\$ 300.00				\$ 300.00
Correct Nov. Donation - Reimb to PTA			\$ (390.00)									
		\$ 14,900.19	\$ 716.00	\$ 18,037.00	\$ 7,097.00	\$ 4,212.55	\$ 12,206.50	\$ 2,396.00	\$ -	\$ -	\$ -	\$ 59,565.24

# LAKESIDE UNION SCHOOL DISTRICT

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**Governing Board Meeting Date:** 4/11/24

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**Agenda Item:**

Administrative Regulation 4161.2/4261.2/4361.2: Personal Leaves

**Background (Describe purpose/rationale of the agenda item):**

Adoption: Regulation updated to reflect NEW LAW (AB 1949, 2022) which requires a district to provide up to five days of bereavement leave to a qualified employee for the death of a family member, and provide clarifying language regarding the definitions of "family member" and "immediate family" and implications for bereavement leave. Regulation also updated to reference NEW LAW (AB 1041, 2022) which expands the definition of a family member for whom an eligible employee may take leave to care for to include a "designated person."

**Fiscal Impact (Cost):**

N/A

**Funding Source:**

N/A

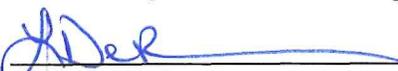
**Recommended Action:**

- |                                                     |                                                                                       |
|-----------------------------------------------------|---------------------------------------------------------------------------------------|
| <input type="checkbox"/> <b>Informational</b>       | <input type="checkbox"/> <b>Denial</b>                                                |
| <input type="checkbox"/> <b>Discussion</b>          | <input type="checkbox"/> <b>Ratification</b>                                          |
| <input type="checkbox"/> <b>Approval</b>            | <input type="checkbox"/> <b>Explanation:</b> <small>Click here to enter text.</small> |
| <input checked="" type="checkbox"/> <b>Adoption</b> |                                                                                       |

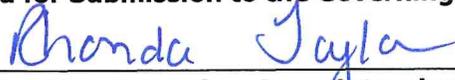
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**Originating Department/School:** Superintendent's Office

**Submitted/Recommended By:**

  
\_\_\_\_\_  
Lisa DeRosier, Executive Assistant

**Approved for Submission to the Governing Board:**

  
\_\_\_\_\_  
Dr. Rhonda Taylor, Superintendent

**Reviewed by Cabinet Member:** \_\_\_\_\_

**All Personnel**

AR 4161.2

4261.2

**PERSONAL LEAVES**

4361.2

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.

**Bereavement**

Employees are entitled to a leave of up to five days upon the death of any member of the employee's immediate family, as defined in Education Code 44985 and 45194. (Government Code 12945.7)

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; Government Code 12945.7)

*Immediate Family* means a parent, parent-in-law, grandparent, or grandchild of the employee or of the spouse of the employee, and the spouse, domestic partner, child, child-in-law, or sibling of the employee, or any relative living in the immediate household of the employee. (Education Code 44985, 45194)

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 accrued personal illness/injury leave (sick leave) during each school year for reasons of personal necessity. (Education Code 44981, 45207; Government Code 12945.7)

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 or the employee's property, or the person or property of a member of the employee's immediate family (Education Code 44981, 45207)

3. Illness, preventative care, or other need of a member of the employee's family, as defined in Labor Code 245.5 (Education Code 44981; Government Code 12945.2; Labor Code 246.5)
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 a request reflects personal necessity.

Advance permission shall not be required of an employee in any cases 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 the employee's immediate family, or the illness or other need of a member of the employee's family. (Education Code 44981, 45207)

For any leave that is planned, or where the need 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.

After any absence due to personal necessity, the employee shall verify the absence by submitting a completed and signed district absence form to the employee's immediate supervisor.

### **Leave to Perform 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 who is called for jury duty shall be granted leave with pay up to the amount of the difference between the employee's regular earnings and any amount received for jury fees.

A certificated employee who is called for jury duty also shall be granted leave with pay up to the difference between the employee's regular earnings and any jury fees received. (Education Code 44036)

An employee shall be granted leaves with pay to appear in court as a witness other than a litigant 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 employee shall receive the difference between the employee's regular earnings and any witness fees received. (Education Code 44036)

### **Leaves for Crime Victims for Judicial Proceedings**

An employee who is a victim of a crime, or an immediate family member, registered domestic partner, or child of a registered domestic partner of a such victim may be absent from work in order to attend related judicial proceedings, if the crime is any of the following: (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

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 the Superintendent or designee 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 the leave. (Labor Code 230.2)

### **Leaves for Victims of Crime or Abuse**

An employee who is a victim of domestic violence, ~~or~~ sexual assault, or stalking, or a crime that caused physical injury or that caused mental injury with a threat of physical injury; or an employee whose immediate family member, as defined, is deceased as the direct result of a crime may use vacation, sick leave, personal leave, or compensatory time off that is otherwise available to the employee 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 the employee's child
2. Seek medical attention for injuries caused by crime or abuse

3. Obtain services from a domestic violence shelter, program, rape crisis center, or victim services organization or agency as a result of the crime or abuse
4. Obtain psychological counseling or mental health services related to an experience of crime or abuse
5. Participate in safety planning and take other actions to increase safety from future crime or abuse including temporary or permanent relocation

Prior to taking time off, an employee shall give reasonable notice to the Superintendent or designee, unless advance notice is not feasible. When an unscheduled absence occurs, the employee shall provide, 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.
2. A court order protecting or separating the employee from the perpetrator of the crime or abuse, or other evidence from the court or prosecuting attorney that the employee has appeared in court.
3. Documentation from a domestic violence or assault counselor as defined in Evidence Code 1037.1 or 1035.2, licensed medical professional or health care provider, victim advocate, or counselor that the employee was undergoing treatment or receiving services for physical or mental injuries or abuse resulting from the crime or abuse
4. Any other form of documentation that reasonably verifies that the crime or abuse occurred, including, but not limited to, a written statement signed by the employee or by an individual acting on the employee's behalf certifying that the absence is for a purpose authorized under Labor Code 230 or 230.1

The district shall maintain the confidentiality of such an employee to the extent authorized by law. (Labor Code 230, 230.1)

The Superintendent or designee shall inform employees of the rights provided employees pursuant to Labor Code 230 and 230.1 using a form developed by the Labor Commissioner or a substantially similar form developed by the district. Such information shall be provided to new employees upon hire and to other employees upon request. (Labor Code 230.1)

### **Personal Leave for Activities**

Any employee who is a parent/guardian of one or more children an age to attend any of grades K-12 or a program offered by a licensed day care provider may use up to 40 hours of personal leave, vacation, or compensatory time off each school year in order to: (Labor Code 230.8)

1. Find, enroll, or reenroll a 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.

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
  - 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

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 two or more parents/guardians of a child are employed at the same work site, this leave shall be allowed for the parent/guardian who first gives notice to the district. Simultaneous absence by 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 child care provider that the employee 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 employees shall be granted up to 20 school days of paid leave per school year for service performed within the state on any education boards, commissions, committees, or groups authorized by Education Code 44987.3 provided that all of the following conditions are met: (Education Code 44987.3)

1. The service is performed in 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 service, to reimburse the district, upon the district's request, for compensation paid to the employee's substitute and for actual related administrative costs.

## **Employee Organization Activities**

Upon request, any certificated and classified employees 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. Such leave shall be in addition to any other leave to which the employee may be entitled by other laws or a memorandum of understanding or collective bargaining agreement. (Education Code 44987, 45210)

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 on which the employee serves as an officer. (Education Code 44987, 45210)

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 employee 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 the employee's 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)

Within two business days of receiving official notice that the employee's spouse will be on leave from deployment, the employee shall provide the Superintendent or designee with notice of the intention to take the leave. The employee shall submit written documentation certifying

that the employee's 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 the employee, 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:*

<b>State</b>	<b>Description</b>
<i>CA Constitution Article I, Section 8</i>	<i>Religious discrimination</i>
<i>Ed. Code 44036-44037</i>	<i>Leaves of absence for judicial and official appearances</i>
<i>Ed. Code 44963</i>	<i>Power to grant leaves of absence; certificated</i>
<i>Ed. Code 44981</i>	<i>Leave of absence for personal necessity</i>
<i>Ed. Code 44985</i>	<i>Leave of absence due to death in immediate family; certificated</i>
<i>Ed. Code 44987</i>	<i>Service as officer of employee organization; certificated</i>
<i>Ed. Code 44987.3</i>	<i>Leave of absence to serve on certain boards, commissions, etc.</i>
<i>Ed. Code 45190</i>	<i>Leaves of absence and vacation; classified</i>
<i>Ed. Code 45194</i>	<i>Bereavement leave of absence; classified</i>
<i>Ed. Code 45198</i>	<i>Effect of provisions authorizing leaves of absence</i>
<i>Ed. Code 45207</i>	<i>Personal necessity; classified</i>
<i>Ed. Code 45210</i>	<i>Service as officer of employee organization; classified</i>
<i>Evid. Code 1035.2</i>	<i>Sex assault counselor; definition</i>
<i>Evid. Code 1037.1</i>	<i>Domestic violence counselor; definition</i>
<i>Fam. Code 297-297.5</i>	<i>Rights, protections, benefits under the law; registered domestic partners</i>
<i>Gov. Code 12945.1-12945.2</i>	<i>California Family Rights Act</i>
<i>Gov. Code 12945.7</i>	<i>Bereavement leave</i>
<i>Gov. Code 3543.1</i>	<i>Rights of employee organizations</i>
<i>Lab. Code 1500-1507</i>	<i>Civil Air Patrol leave</i>
<i>Lab. Code 230-230.2</i>	<i>Leaves for victims of domestic violence, sexual assault or specified felonies</i>
<i>Lab. Code 230.3</i>	<i>Leave for emergency personnel</i>
<i>Lab. Code 230.4</i>	<i>Leave for volunteer firefighters</i>

<i>Lab. Code 230.8</i>	<i>Time off to visit child's school</i>
<i>Lab. Code 233</i>	<i>Leave to attend to family illness</i>
<i>Lab. Code 234</i>	<i>Absence control policy</i>
<i>Lab. Code 246.5</i>	<i>Paid sick days; purposes for use</i>
<i>M&amp;V Code 395.10</i>	<i>Leave when spouse on leave from military deployment</i>
<i>Pen. Code 1192.7</i>	<i>Plea bargaining limitation</i>
<i>Pen. Code 667.5</i>	<i>Prior prison terms; enhancement of prison terms</i>

<b>Federal</b>	<b>Description</b>
<i>29 USC 2601-2654</i>	<i>Family Care and Medical Leave Act</i>
<i>42 USC 2000d-2000d-7</i>	<i>Title VI, Civil Rights Act of 1964</i>

<b>Management Resources</b>	<b>Description</b>
<i>Court Decision</i>	<i>Rankin v. Commission on Professional Competence, (1988) 24 Cal.3d 167</i>
<i>Public Employment Relations Board Decision</i>	<i>Berkeley Council of Classified Employees v. Berkeley Unified School District, (2008) PERB Decision No. 1954</i>
<i>Website</i>	<i>California Department of Industrial Relations</i>
<i>Website</i>	<i>California Federation of Teachers</i>
<i>Website</i>	<i>California Public Employment Relations Board</i>
<i>Website</i>	<i>California School Employees Association</i>
<i>Website</i>	<i>California Teachers Association</i>

#### **Cross References**

<b>Code</b>	<b>Description</b>
<i>2121</i>	<i>Superintendent's Contract</i>
<i>4112.9</i>	<i>Employee Notifications</i>
<i>4112.9-E(1)</i>	<i>Employee Notifications</i>
<i>4112.9-E PDF(1)</i>	<i>Employee Notifications</i>
<i>4121</i>	<i>Temporary/Substitute Personnel</i>
<i>4140</i>	<i>Bargaining Units</i>
<i>4141.6</i>	<i>Concerted Action/Work Stoppage</i>
<i>4143</i>	<i>Negotiations/Consultation</i>
<i>4158</i>	<i>Employee Security</i>
<i>4161</i>	<i>Leaves</i>
<i>4161.1</i>	<i>Personal Illness/Injury Leave</i>
<i>4161.8</i>	<i>Family Care and Medical Leave</i>
<i>4212.9</i>	<i>Employee Notifications</i>
<i>4212.9-E(1)</i>	<i>Employee Notifications</i>
<i>4212.9-E PDF(1)</i>	<i>Employee Notifications</i>
<i>4240</i>	<i>Bargaining Units</i>
<i>4241.6</i>	<i>Concerted Action/Work Stoppage</i>
<i>4243</i>	<i>Negotiations/Consultation</i>
<i>4258</i>	<i>Employee Security</i>
<i>4261</i>	<i>Leaves</i>
<i>4261.1</i>	<i>Personal Illness/Injury Leave</i>
<i>4261.8</i>	<i>Family Care and Medical Leave</i>
<i>4312.9</i>	<i>Employee Notifications</i>
<i>4312.9-E(1)</i>	<i>Employee Notifications</i>
<i>4312.9-E PDF(1)</i>	<i>Employee Notifications</i>
<i>4340</i>	<i>Bargaining Units</i>
<i>4358</i>	<i>Employee Security</i>
<i>4361</i>	<i>Leaves</i>
<i>4361.1</i>	<i>Personal Illness/Injury Leave</i>
<i>4361.8</i>	<i>Family Care and Medical Leave</i>
<i>5148</i>	<i>Child Care and Development</i>

Regulation 4161.2  
approved: September 17, 2012  
revised: April 11, 2024

**LAKESIDE UNION SCHOOL DISTRICT**  
Lakeside, California

# LAKESIDE UNION SCHOOL DISTRICT

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**Governing Board Meeting Date:** 4/11/24

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**Agenda Item:**

Administrative Regulation 4161.8/4261.8/4361.8: Family Care and Medical Leave

**Background (Describe purpose/rationale of the agenda item):**

Adoption: Regulation updated to reflect NEW LAW (AB 1041, 2022) which expands the definition of a family member for whom an eligible employee may take leave to care for to include a "designated person," provide that an employee may identify the designated person at the time of the employee's request for leave, and include that the district may limit an employee's use of CFRA leave to care for one designated person per 12-month period.

**Fiscal Impact (Cost):**

N/A

**Funding Source:**

N/A

**Recommended Action:**

- |                                                     |                                                                                       |
|-----------------------------------------------------|---------------------------------------------------------------------------------------|
| <input type="checkbox"/> <b>Informational</b>       | <input type="checkbox"/> <b>Denial</b>                                                |
| <input type="checkbox"/> <b>Discussion</b>          | <input type="checkbox"/> <b>Ratification</b>                                          |
| <input type="checkbox"/> <b>Approval</b>            | <input type="checkbox"/> <b>Review</b> <small>Click here to enter text.</small>       |
| <input checked="" type="checkbox"/> <b>Adoption</b> | <input type="checkbox"/> <b>Explanation:</b> <small>Click here to enter text.</small> |

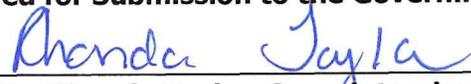
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**Originating Department/School:** Superintendent's Office

**Submitted/Recommended By:**

  
\_\_\_\_\_  
Lisa DeRosier, Executive Assistant

**Approved for Submission to the Governing Board:**

  
\_\_\_\_\_  
Dr. Rhonda Taylor, Superintendent

**Reviewed by Cabinet Member:** \_\_\_\_\_

**All Personnel**

AR 4161.8

4261.8

**FAMILY CARE AND MEDICAL LEAVE**

4361.8

The district shall not deny any eligible employee the right to family care or medical leave pursuant to the Family and Medical Leave Act (FMLA) or the California Family Rights Act (CFRA), or to Pregnancy Disability Leave (PDL) when an employee is disabled by a pregnancy, childbirth, or related medical condition. The district shall not interfere with, restrain, or deny the exercise of an employee's right to any such leave, nor shall the district discharge, discriminate against, or retaliate against an employee for taking such leave, opposing or challenging an unlawful employment practice in relation to any of these laws, or being involved in any related inquiry or proceeding. (Government Code 12945, 12945.2; 2 CCR 11094; 29 USC 2615)

**Definitions**

The words and phrases defined below shall have the same meaning throughout this administrative regulation except where a different meaning is otherwise specified.

*Child* means a biological, adopted, or foster child; a stepchild; a legal ward; or a person to whom the employee stands in loco parentis. For purposes of CFRA leave, *child* also includes a child of a registered domestic partner. (Government Code 12945.2; 29 USC 2611)

*Designated person*, for CFRA purposes, means any individual related by blood, or whose association with the employee is the equivalent of a family relationship. (Government Code 12945.2)

*Eligible employee*, for FMLA and CFRA purposes, means an employee who has been employed with the district for at least 12 months and who has at least 1,250 hours of service with the district during the 12-months immediately preceding the leave. However, these requirements shall not apply when an employee applies for PDL. (Government Code 12945.2; 2 CCR 11087; 29 USC 2611; 29 CFR 825.110)

*Eligible family member* means an employee's child, parent, or spouse. For purposes of leave to care for a family member with a serious health condition pursuant to CFRA, *eligible family member* includes an employee's child, parent, parent-in-law, spouse, registered domestic partner, grandparent, grandchild, or sibling, or designated person. (Government Code 12945.2; 2 CCR 11087; 29 USC 2612)

*Employee disabled by pregnancy* means an employee whose health care provider states that the employee is: (2 CCR 11035)

1. Unable because of pregnancy to perform any one or more of the essential functions of the job or to perform any of them without undue risk to the employee or other persons or to the pregnancy's successful completion
2. Suffering from severe "morning sickness" or needs to take time off for prenatal or postnatal care, bed rest, gestational diabetes, pregnancy-induced hypertension,

preeclampsia, postpartum depression, childbirth, loss or end of pregnancy, recovery from childbirth or loss or end of pregnancy, or any other pregnancy-related condition

*Parent* means a biological, foster, or adoptive parent; a parent-in-law, a stepparent; a legal guardian; or another person who stood in *loco parentis* to the employee when the employee was a child. However, for FMLA purposes, parent does not include a spouse's parents. (Government Code 12945.2; 2 CCR 11087; 29 USC 26114; 29 CFR 825.122)

*Serious health condition* means an illness, injury (including, but not limited to, on-the-job injuries), impairment, or physical or mental condition of the employee or an eligible family member of the employee that involves either inpatient care or continuing treatment, including treatment for substance abuse, as follows: (Government Code 12945.2; 2 CCR 11087, 11097; 29 USC 2611, 2612; 29 CFR 825.113-825.115)

1. Inpatient care in a hospital, hospice, or residential health care facility, any subsequent treatment in connection with such inpatient care, or any period of incapacity

A person is considered an inpatient when formally admitted to a health care facility with the expectation of remaining overnight and occupying a bed, even if it later develops that the person can be discharged or transferred to another facility and does not actually remain overnight.

*Incapacity* means the inability to work, attend school, or perform other regular daily activities due to a serious health condition, its treatment, or the recovery that it requires.

2. Continuing treatment or continuing supervision by a health care provider, including one or more of the following:
  - a. A period of incapacity of more than three consecutive full days
  - b. Any period of incapacity or treatment for such incapacity due to a chronic serious health condition
  - c. Any period of incapacity due to pregnancy or for prenatal care under FMLA
  - d. Any period of incapacity which is permanent or long term due to a condition for which treatment may not be effective
  - e. Any period of absence to receive multiple treatments, including recovery, by a health care provider

*Spouse* means a partner in marriage as defined in Family Code 300, including same sex partners in marriage. For purposes of CFRA leave, *spouse* also includes a registered domestic partner within the meaning of Family Code 297-297.5. (Family Code 297, 297.5, 300; 2 CCR 11087; 29 CFR 825.122)

## **Eligibility/Purposes of Leave**

The district shall grant FMLA or CFRA to eligible employees for any of the following reasons: (Government Code 12945.2; 29 USC 2612; 29 CFR 825.112, 825.126, 825.127)

1. The birth of a child of the employee or placement of a child with the employee in connection with the employee's adoption or foster care of the child (parental leave)
2. The care of an eligible family member with a serious health condition
3. The employee's own serious health condition that makes the employee unable to perform the job functions of the position
4. A qualifying exigency arising out of the fact that the employee's spouse, child, parent, or, for CFRA leave only, a registered domestic partner, is a military member on covered active duty or call to covered active duty (or has been notified of an impending call or order to covered active duty)
5. The care of a covered servicemember with a serious injury or illness when the employee is a spouse, child, parent, or next of kin of the covered servicemember

In addition, the district shall grant PDL to any employee who is disabled by pregnancy, childbirth, or related medical condition. (Government Code 12945; 2 CCR 11037)

## **Terms of Leave**

An eligible employee shall be entitled to a total of 12 work weeks of FMLA or CFRA leave during any 12-month period, except in the case of leave to care for a covered servicemember as provided under "Military Caregiver Leave" below. To the extent allowed by law, CFRA and FMLA leaves shall run concurrently. (Government Code 12945.2; 29 USC 2612)

The 12-month period shall coincide with the fiscal year. (29 CFR 825.200)

In addition, any employee who is disabled by pregnancy, childbirth, or other related condition shall be entitled to PDL for the period of the disability not to exceed four months. For a part-time employee, the four months shall be calculated on a proportional basis. (Government Code 12945; 2 CCR 11042)

PDL shall run concurrently with FMLA leave for disability caused by an employee's pregnancy. At the end of the employee's FMLA leave for disability caused by pregnancy, or at the end of four months of PDL, whichever occurs first, a CFRA-eligible employee may request to take CFRA leave of up to 12 work weeks, for the reason of the birth of a child or to bond with or care for the child. (Government Code 12945, 12945.2; 2 CCR 11046, 11093)

Leave taken for the birth or placement of a child must be concluded within the 12-month period beginning on the date of the birth or placement of the child. Such leave does not need to be taken in one continuous period of time. (2 CCR 11090; 29 USC 2612)

Each eligible employee shall be granted up to 12 work weeks for family care and medical leave related to the birth or placement of a child, regardless of whether both parents of the child work for the district.

### **Use/Substitution of Paid Leave**

During any otherwise unpaid period of PDL or any FMLA or CFRA leave, the employee may elect to use accrued vacation leave, or any other paid time off negotiated with the district that the employee is eligible to use. If the leave is for the employee's own serious health condition or PDL, the employee may also elect to use accrued sick leave during the period of leave. (Government Code 12945, 12945.2; 2 CCR 11044; 11092; 29 USC 2612)

The district and employee may also come to agreement regarding the use of any additional paid or unpaid time off instead of using the employee's CFRA leave. (2 CCR 11092)

### **Intermittent Leave/Reduced Leave Schedule**

PDL and family care and medical leave for the serious health condition of an employee or eligible family member may be taken intermittently or on a reduced leave schedule when medically necessary, as determined by the health care provider of the person with the serious health condition. However, the district shall limit leave increments to the shortest period of time that the district's payroll system uses to account for absences or use of leave provided it is not to be greater than one hour. (Government Code 12945.2; 2 CCR 11042, 11090; 29 USC 2612)

The basic minimum duration of leave for the birth, adoption, or foster care placement of a child shall be two weeks. However, the district shall grant a request for such leave of less than two weeks on any two occasions. (2 CCR 11090; 29 USC 2612)

The district may require an employee to transfer temporarily to an available alternative position under any of the following circumstances: (2 CCR 11041, 11090; 29 USC 2612)

1. The employee needs intermittent leave or leave on a reduced work schedule that is foreseeable based on a planned medical treatment for the employee or family member.
2. A medical certification is provided by the employee's health care provider that, because of pregnancy, the employee has a medical need to take intermittent leave or leave on a reduced work schedule.
3. The district agrees to permit intermittent leave or leave on a reduced work schedule due to the birth, adoption, or foster care placement of the employee's child.

The alternative position must have equivalent pay and benefits and must better accommodate recurring periods of leave than the employee's regular job, and the employee must be qualified for the position. Transfer to an alternative position may include altering an existing job to better accommodate the employee's need for intermittent leave or a reduced work or leave schedule. (2 CCR 11041, 11090; 29 USC 2612)

## **Request for Leave**

The district shall consider an employee's request for PDL or family care and medical leave only if the employee provides at least verbal notice sufficient to make the district aware of the need to take the leave and the anticipated timing and duration of the leave. (2 CCR 11050, 11091)

For family care and medical leave, the employee need not expressly assert or mention FMLA/CFRA to satisfy this requirement. However, the employee must state the reason the leave is needed (e.g., birth of child, medical treatment). If more information is necessary to determine whether the employee is eligible for family care and medical leave, the Superintendent or designee shall inquire further and obtain the necessary details of the leave to be taken. (2 CCR 11091)

The district shall respond to requests for leave as soon as practicable, but no later than five business days after receiving the employee's request. (2 CCR 11091)

Based on the information provided by the employee, the Superintendent or designee shall designate the leave, paid or unpaid, as FMLA/CFRA qualifying leave and shall give notice of such designation to the employee. Failure of an employee to respond to permissible inquiries regarding the leave request may result in denial of CFRA protection if the district is unable to determine whether the leave is CFRA qualifying. (2 CCR 11091; 29 CFR 825.300)

When an employee is able to foresee the need for PDL or family care and medical leave at least 30 days in advance of the leave, the employee shall provide the district with at least 30 days advance notice before the leave. When the 30 days' notice is not practicable because of a lack of knowledge of when leave will be required to begin, a change in circumstances, a medical emergency, or other good cause, the employee shall provide the district with notice as soon as practicable. Failure of an employee to provide required notice may result in a denial of leave. (2 CCR 11050, 11091)

In all instances, the employee shall consult with the Superintendent or designee and make a reasonable effort to schedule, subject to the health care provider's approval, any planned appointment or medical treatment or supervision so as to minimize disruption to district operations. (Government Code 12945.2; 2 CCR 11050, 11091)

An eligible employee may request CFRA leave to care for a designated person with a serious health condition. The employee may identify the designated person at the time of the employee's request for the leave. The district may limit an employee to using CFRA leave to care for one designated person per 12-month period. (Government Code 12945.2; Labor Code 245.5)

## **Certification of Health Condition**

Within five business days of an employee's request for family care and medical leave for the serious health condition of the employee or an eligible family member, the Superintendent or designee shall request that the employee provide certification by a health care provider of the need for leave. Upon receiving the district's request, the employee shall provide the certification within 15 calendar days, unless either the

Superintendent or designee provides additional time or it is not practicable under the particular circumstances, despite the employee's diligent, good faith efforts. (11087, 11091; 29 CFR 825.305)

The certification shall include the following: (Government Code 12945.2; 2 CCR 11087; 29 USC 2613)

1. The date on which the serious health condition began
2. The probable duration of the condition
3. If the employee is requesting leave to care for an eligible family member with a serious health condition, both of the following:
  - a. Statement that the serious health condition warrants the participation of the employee to provide care, such as by providing psychological comfort, arranging for third party care, or directly providing or participating in the medical care of the eligible family member during a period of the treatment or supervision
  - b. Estimated amount of time the health care provider believes the employee needs to care for the eligible family member
4. If the employee is requesting leave because of the employee's own serious health condition, a statement that due to the serious health condition, the employee ~~he~~/she is unable to work at all or is unable to perform one or more essential job functions of the position
5. If the employee is requesting leave for intermittent treatment or is requesting leave on a reduced leave schedule for planned medical treatment, a statement of the medical necessity for the leave, the dates on which treatment is expected to be given, the duration of such treatment, and the expected duration of the leave

The Superintendent or designee shall not request any genetic information related to an employee as authorized by law in accordance with the California Genetic Information Nondiscrimination Act of 2011 (Government Code 12940)

When an employee has provided sufficient medical certification to enable the district to determine whether the employee's leave request is FMLA/CFRA-eligible, the Superintendent or designee shall notify the employee within five business days whether the leave is FMLA/CFRA-eligible. The Superintendent or designee may also retroactively designate leave as FMLA/CFRA leave as long as appropriate notice is given to the employee and there is not harm or injury to the employee. (2 CCR 11091; 29 CFR 825.301)

If the Superintendent or designee has a good faith objective reason to doubt the validity of a certification that accompanies a request for leave for the employee's own serious health condition, the Superintendent or designee may require the employee to obtain a second opinion from a district-approved health care provider, at district expense. If the second opinion is

contrary to the first, the Superintendent or designee may require the employee to obtain a third medical opinion from a third health care provider approved by both the employee and the district, again at district expense. The opinion of the third health care provider shall be final and binding. (Government Code 12945.2; 2 CCR 11091; 29 USC 2613)

### **Release to Return to Work**

Upon expiration of an employee's PDL or family care and medical leave taken for the employee's own serious health condition, the employee shall present certification from the health care provider of the employee's ability to resume work. The certification shall address the employee's ability to perform the essential job functions of the position.

### **Rights to Reinstatement**

Upon granting an employee's request for PDL or FMLA/CFRA leave, the Superintendent or designee shall guarantee to reinstate the employee in the same or a comparable position when the leave ends. (Government Code 12945.2; 2 CCR 11043, 11089; 29 USC 2614)

The district may refuse to reinstate an employee to the same or a comparable position after taking PDL if, the FMLA/CFRA leave was fraudulently obtained by the employee. (2 CCR 11089; 29 CFR 825.216)

The district may refuse to reinstate an employee to the same position after taking PDL if, at the time the reinstatement is requested, the employee would not otherwise have been employed in that position for legitimate business reasons unrelated to the employee's PDL. (2 CCR 11043)

### **Maintenance of Benefits/Failure to Return from Leave**

During the period when an employee is on PDL or FMLA/CFRA leave, the employee shall maintain employee status with the district and the leave shall not constitute a break in service for purposes of longevity, seniority under any collective bargaining agreement, or any employee benefit plan. (Government Code 12945.2; 2 CCR 11092; 29 USC 2614)

For up to a maximum of four months for PDL and 12 work weeks for other family care and medical leave, the district shall continue to provide an eligible employee the group health plan coverage that was in place before the employee took the leave. The employee shall reimburse the district for premiums paid during the leave if the employee fails to return to district employment after the expiration of all available leaves and the failure is for reason other than the continuation, recurrence, or onset of a serious health condition or other circumstances beyond the employee control. (Government Code 12945.2; 2 CCR 11044, 11092; 29 USC 2614; 29 CFR 825.213)

In addition, during the period when an employee is on PDL or family care and medical leave, the employee shall be entitled to continue to participate in other employee benefit plans including life insurance, short-term or long-term disability insurance, accident insurance, pension and retirement plans, and supplemental unemployment benefit plans to the same extent and under the same conditions as apply to an unpaid leave taken for any other purpose. However, for purposes of pension and retirement plans, the district shall not make plan

payments for an employee during any unpaid portion of the leave period shall not be counted for purposes of time accrued under the plan. (Government Code 12945.2; 2 CCR 11044, 11092)

### **Military Family Leave Resulting from Qualifying Exigencies**

An eligible employee may take up to 12 work weeks of unpaid FMLA/CFRA leave, during each 12-month period established by the district in the section entitled "Terms of Leave" above, for one or more qualifying exigencies while the employee's child, parent, spouse, or, for purposes of CFRA leave, registered domestic partner, who is a military member is on covered active duty or on call to covered active duty status. (Government Code 12945.2; 29 USC 2612; 29 CFR 825.126)

*Covered active duty* means duty, for members of the Regular Armed forces, duty during the deployment of a member of the regular Armed Forces to a foreign country and, for members of the Reserve components of the Armed forces, duty during the deployment of a member of the National Guard or Reserves to a foreign country under a call or order to active duty in support of a contingency operation pursuant to law. Deployment to a foreign country includes deployment to international waters. (29 USC 2611; 29 CFR 825.126)

*Qualifying exigencies* include time needed to: (29 CFR 825.126)

1. Address issues arising from short notice deployment (up to seven calendar days from the date of receipt of call or order of short notice deployment)
2. Attend military events and related activities, such as any official ceremony or family assistance program related to the covered active duty or call to covered active duty status
3. Arrange childcare or attend school activities arising from the active duty or call to active duty, such as arranging for alternative childcare, enrolling or transferring a child to a new school, or attending meetings
4. Make or update financial and legal arrangements to address a covered military member's absence
5. Attend counseling provided by someone other than a health care provider
6. Spend time (up to 15 calendar days of leave per instance) with a military member who is on short-term, temporary, rest and recuperation leave during deployment
7. Attend to certain post-deployment activities, such as arrival ceremonies or reintegration briefings
8. Care for a military member's parent who is incapable of self-care when the care is necessitated by the military member's covered active duty
9. Address any other event that the employee and district agree is a qualifying exigency

The employee shall provide the Superintendent or designee with notice of the need for the qualifying exigency leave as soon as practicable, regardless of how far in advance such leave is foreseeable. (29 CFR 825.302)

An employee who is requesting leave for qualifying exigencies shall provide the Superintendent or designee with a copy of the military member's active duty orders, or other documentation issued by the military, and the dates of the service. In addition, the employee shall provide the Superintendent or designee with certification of the qualifying exigency necessitating the leave. The certification shall contain the information specified in 29 CFR 825.309.

The employee's qualifying exigency leave may be taken on an intermittent or reduced leave schedule basis. (29 CFR 825.302)

During the period of qualified exigency leave, the district's rule regarding an employee's use of accrued vacation leave and any other accrued paid or unpaid time off, as specified in "Use/Substitution of Paid Leave" above, shall apply.

### **Military Caregiver Leave**

The district shall grant an eligible employee up to a total of 26 work weeks of leave during a single 12-month period, measured forward from the first date of leave taken, to care for a covered servicemember with a serious illness or injury. In order to be eligible for such military caregiver leave, the employee must be the spouse, child, parent, or next of kin of the covered servicemember. This 26-week period is inclusive of the 12 work weeks of leave that may be taken for other FMLA qualifying reasons. (29 USC 2611, 2612; 29 CFR 825.127)

*Covered servicemember* may be either: (29 USC 2611)

1. A current member of the Armed Forces, including a member of the National Guard or Reserves, who is undergoing medical treatment, recuperation, or therapy; is otherwise in outpatient status; or is otherwise on the temporary disability retired list for a serious injury or illness
2. A veteran who was discharged or released under conditions other than dishonorable at any time during the five-year period prior to the first date the eligible employee takes FMLA leave to care for the covered veteran

*Child of a covered servicemember* means the covered servicemember's biological, adopted, or foster child, stepchild, legal ward, or a child for whom the covered servicemember stood in *loco parentis*, and who is of any age. (29 CFR 825.127)

*Parent of a covered servicemember* means the covered servicemember's biological, adopted, step or foster parent, or any other individual who stood in *loco parentis* to the covered servicemember (except "parents in law"). (29 CFR 825.127)

*Next of kin* means the nearest blood relative to the covered servicemember, other than the spouse, parent, or child unless designated in writing by the covered servicemember. (29 USC 2611, 2612; 29 CFR 825.127)

*Outpatient status* means the status of a member of the Armed Forces assigned to a military medical treatment facility as an outpatient or a unit established for the purpose of providing command and control of members of the Armed Forces receiving medical care as outpatients. (29 USC 2611; 29 CFR 825.127)

*Serious injury or illness* means: (29 USC 2611; 29 CFR 825.127)

1. For a current member of the Armed Forces, an injury or illness incurred by the member in the line of duty on active duty, or that existed before the beginning of the member's active duty and was aggravated by the member's service in the line of duty while on active duty in the Armed Forces, and that may render the member medically unfit to perform the duties of the member's office, grade, rank, or rating.
2. For a veteran, an injury or illness incurred or aggravated by the member's service in the line of duty on active duty in the Armed Forces, including the National Guard or Reserves, that manifested itself before or after the member became a veteran and that is at least one of the following:
  - a. A continuation of a serious injury or illness incurred or aggravated while the veteran was a member of the Armed Forces and rendered the servicemember unable to perform the duties of the servicemember's office, grade, rank, or rating
  - b. A physical or mental condition for which the veteran has received a U.S. Department of Veterans Affairs (VA) Service-Related Disability Rating of 50 percent or greater, based wholly or partly on that physical or mental condition
  - c. A physical or mental condition that substantially impairs the veteran's ability to secure or follow a substantially gainful occupation by reason of one or more disabilities related to the servicemember's military service or that would do so but for treatment received by the veteran
  - d. An injury, including a psychological injury, on the basis of which the veteran has been enrolled in the VA's Program of Comprehensive Assistance for Family Caregivers

The employee shall provide reasonable and practicable notice of the need for the leave in accordance with the procedures in the section entitled "Request for Leave" above.

The leave may be taken intermittently or on a reduced work or leave schedule when medically necessary. An employee taking military caregiver leave in combination with other family care and medical leaves pursuant to this administrative regulation shall be entitled to a combined total of 26 work weeks of leave during a single 12-month period. When both spouses work for the district and both wish to take such leave, the spouses are limited to a maximum combined total of 26 work weeks during a single 12-month period. (29 USC 2612)

During the period of military caregiver leave, the district's rule regarding an employee's use of accrued vacation leave and other accrued paid or unpaid time off, as specified in "Use/Substitution of Paid Leave" above, shall apply.

## **Notifications**

The Superintendent or designee shall provide the following notifications about state and federal law related to FMLA/CFRA leave:

1. **General Notice:** Information explaining the provisions of the Fair Employment and Housing Act PDL and FMLA/CFRA and employees' rights and obligations shall be posted in a conspicuous place on district premises, or electronically, and shall be included in employee handbooks. (2 CCR 11049, 11095; 29 USC 2619)

The general notice shall also explain an employee's obligation to provide the Superintendent or designee with at least 30 days' notice of the need for the requested leave, when the need is reasonably foreseeable at least 30 days prior to the start of the leave. (2 CCR 11049, 11050, 11091)

2. **Eligibility Notice:** When an employee requests leave, including PDL, or when the Superintendent or designee acquires knowledge that an employee's leave may be for an FMLA/CFRA qualifying reason, the Superintendent or designee shall, within five business days, provide notification to the employee of eligibility to take such leave. (2 CCR 11049, 11091; 29 CFR 825.300)
3. **Rights and Responsibilities Notice:** Each time the eligibility notice is provided to an employee, the Superintendent or designee shall provide written notification explaining the specific expectations and obligations of the employee, including any consequences for a failure to meet those obligations. Such notice shall include, as appropriate: (29 CFR 825.300)
  - a. A statement that the leave may be designated and counted against the employee's annual FMLA/CFRA leave entitlement and the appropriate 12-month entitlement period, if qualifying
  - b. Any requirements for the employee to furnish medical certification of a serious health condition, serious injury or illness, or qualifying exigency arising out of active duty or call to active duty status and the consequences of failing to provide the certification
  - c. The employee's right to use paid leave, whether the district will require use of paid leave, conditions related to any use of paid leave, and the employee's entitlement to take unpaid leave if the employee does not meet the conditions for paid leave
  - d. Any requirements for the employee to make any premium payments necessary to maintain health benefits, the arrangement for making such payments, and the possible consequences of failure to make payments on a timely basis

- e. The employee's right to maintenance of benefits during the leave and restoration to the same or an equivalent job upon return from leave
- f. The employee's potential liability for health insurance premiums paid by the district during the employee's unpaid FMLA leave should the employee not return to service after the leave

Any time the information provided in the above notice changes, the Superintendent or designee shall, within five business days of receipt of an employee's first notice of need for leave, provide the employee with a written notice referencing the prior notice and describing any changes to the notice. (29 CFR 825.300)

- 4. Designation Notice: When the Superintendent or designee has information (e.g., sufficient medical certification) to determine whether the leave qualifies as FMLA/CFRA leave, the Superintendent or designee shall, within five business days, provide written notification designating the leave as FMLA/CFRA qualifying or, if the leave will not be so designated, the reason for that determination. (2 CCR 11091; 29 CFR 825.300)

If the amount of leave needed is known, the notice shall include the number of hours, days, or weeks that will be counted against the employee's FMLA/CFRA entitlement. If it is not possible to provide that number at the time of the designation notice, notification shall be provided of the amount of leave counted against the employee's entitlement upon request by the employee and at least once in every 30-day period if leave was taken in that period. (29 CFR 825.300)

If the district requires paid leave to be used during an otherwise unpaid family care and medical leave, the notice shall so specify. If the district requires an employee to present a release to work certification that addresses the employee's ability to perform the essential functions of the job, the notice shall also specify that requirement. (2 CCR 11091, 11097; 29 CFR 825.300)

Any time the information provided in the designation notice changes, the Superintendent or designee shall, within five business days, provide the employee with written notice referencing the prior notice and describing any changes to the notice. (29 CFR 825.300)

## **Records**

The Superintendent or designee shall maintain records pertaining to an individual employee's use of FMLA or CFRA leave or PDL in accordance with law. (Government Code 12946; 29 USC 2616; 42 USC 2000ff-1; 29 CFR 825.500)

*Legal Reference:*

**State**  
 2 CCR 11035-11051  
 2 CCR 11087-11098  
 Ed. Code 44965

**Description**  
*Unlawful sex discrimination: pregnancy, childbirth and related medical conditions*  
*California Family Rights Act*  
*Granting of leaves of absence for pregnancy and childbirth*

*Fam. Code 297-297.5*  
*Fam. Code 300*  
*Gov. Code 12926*  
*Gov. Code 12940*  
*Gov. Code 12945*  
  
*Gov. Code 12945.1-12945.2*  
*Gov. Code 12945.6*  
*Gov. Code 12946*

*Rights, protections, benefits under the law; registered domestic partners*  
*Definition of marriage*  
*Definitions*  
*Unlawful discriminatory employment practices*  
*Unlawful discrimination based on pregnancy, childbirth, or related medical conditions*  
*California Family Rights Act*  
*Parental leave*  
*Fair employment and Housing Act: discrimination prohibited*

**Federal**

*1 USC 7*  
*29 CFR 825.100-825.702*  
*29 USC 2601-2654*  
*42 USC 2000ff-2000ff-11*

**Description**

*Definition of marriage, and spouse*  
*Family and Medical Leave Act of 1993*  
*Family Care and Medical Leave Act*  
*Genetic Information Nondiscrimination Act of 2008*

**Management Resources**

*Court Decision*  
  
*Court Decision*  
*Court Decision*  
*U.S. Department of Labor Publication*  
  
*Website*  
*Website*

**Description**

*Faust v. California Portland Cement Company, (2007) 150 Cal.App.4th 864*  
*Tellis v. Alaska Airlines, (9th Cir., 2005) 414 F.3d 1045*  
*United States v. Windsor, (2013) 699 F.3d 169*  
*Military Family Leave Provisions of the FMLA Frequently Asked Questions and Answers*  
*U.S. Department of Labor, FMLA*  
*California Department of Fair Employment and Housing*

***Cross References:***

**Code**

*0410*  
  
*0470*  
*2121*  
*4030*  
*4032*  
*4033*  
*4112.2*  
*4112.4*  
*4112.42*  
*4112.9*  
*4112.9-E (1)*  
*4113.4*  
*4117.3*  
*4141*  
*4154*  
*4161*  
*4161.1*  
*4161.2*  
*4161.9*  
*4212.4*  
*4212.42*  
*4212.9*  
*4212.9-E (1)*  
*4213.4*  
*4217.3*  
*4241*  
*4254*

**Description**

*Nondiscrimination In District Programs And Activities*  
*COVID-19 Mitigation Plan*  
*Superintendent's Contract*  
*Nondiscrimination In Employment*  
*Reasonable Accommodation*  
*Lactation Accommodation*  
*Certification*  
*Health Examinations*  
*Drug And Alcohol Testing For School Bus Drivers*  
*Employee Notifications*  
*Employee Notifications*  
*Temporary Modified/Light-Duty Assignment*  
*Personnel Reduction*  
*Collective Bargaining Agreement*  
*Health And Welfare Benefits*  
*Leaves*  
*Personal Illness/Injury Leave*  
*Personal Leaves*  
*Catastrophic Leave Program*  
*Health Examinations*  
*Drug And Alcohol Testing For School Bus Drivers*  
*Employee Notifications*  
*Employee Notifications*  
*Temporary Modified/Light-Duty Assignment*  
*Layoff/Rehire*  
*Collective Bargaining Agreement*  
*Health And Welfare Benefits*

4259	<i>Employee Assistance Programs</i>
4261	<i>Leaves</i>
4261.1	<i>Personal Illness/Injury Leave</i>
4261.2	<i>Personal Leaves</i>
4261.9	<i>Catastrophic Leave Program</i>
4312.4	<i>Health Examinations</i>
4312.42	<i>Drug And Alcohol Testing For School Bus Drivers</i>
4312.9	<i>Employee Notifications</i>
4312.9-E (1)	<i>Employee Notifications</i>
4313.4	<i>Temporary Modified/Light-Duty Assignment</i>
4354	<i>Health And Welfare Benefits</i>
4359	<i>Employee Assistance Programs</i>
4361	<i>Leaves</i>
4361.1	<i>Personal Illness/Injury Leave</i>
4361.2	<i>Personal Leaves</i>
4361.9	<i>Catastrophic Leave Program</i>

Regulation 4161.8  
 approved: September 17, 2012  
 revised: April 11, 2024

**LAKESIDE UNION SCHOOL DISTRICT**  
 Lakeside, California

# LAKESIDE UNION SCHOOL DISTRICT

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**Governing Board Meeting Date:** 4/11/24

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**Agenda Item:**

Board Policy 5131.9: Academic Honesty

**Background (Describe purpose/rationale of the agenda item):**

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

**Fiscal Impact (Cost):**

N/A

**Funding Source:**

N/A

**Recommended Action:**

- |                                                     |                                                                                        |
|-----------------------------------------------------|----------------------------------------------------------------------------------------|
| <input type="checkbox"/> <b>Informational</b>       | <input type="checkbox"/> <b>Denial</b>                                                 |
| <input type="checkbox"/> <b>Discussion</b>          | <input type="checkbox"/> <b>Ratification</b>                                           |
| <input type="checkbox"/> <b>Approval</b>            | <input type="checkbox"/> <b>Explanation:</b> <a href="#">Click here to enter text.</a> |
| <input checked="" type="checkbox"/> <b>Adoption</b> |                                                                                        |

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**Originating Department/School:** Superintendent's Office

**Submitted/Recommended By:**

  
\_\_\_\_\_  
Lisa DeRosier, Executive Assistant

**Approved for Submission to the Governing Board:**

  
\_\_\_\_\_  
Dr. Rhonda Taylor, Superintendent

**Reviewed by Cabinet Member:** \_\_\_\_\_

**ACADEMIC HONESTY**

The Governing Board believes that academic honesty and personal integrity are fundamental components of a student's education and character development. The Board expects that students will not cheat, lie, plagiarize or commit other acts of academic dishonesty.

Students, parents/guardians, staff and administrators shall be responsible for creating and maintaining a positive school climate that encourages honesty. Students found to have committed an act of academic dishonesty shall be subject to district and school-site discipline rules.

The Superintendent or designee may establish a committee comprised of students, parents/guardians, staff, administrators and members of the public to develop standards of academic honesty, measures of preventing dishonesty, and specific consequences for acts of dishonesty. Any recommendations for discipline shall be incorporated into the school's site level discipline rules.

**Prohibited and Permitted Technology Use**

As the district's standards for academic achievement are designed to challenge all students to reach their full potential in acquiring the knowledge and skills needed for success in postsecondary education, employment, and responsible citizenship, any use of technology that prevents or inhibits a student from achieving these standards is prohibited. Prohibited uses include, but are not limited to, using technology primarily or solely for the completion of coursework as a student's original work and generating answers to mathematical, scientific, or analytical problems.

Permitted uses of technology include, but are not limited to, conducting research, correcting grammar and spelling, and learning from educational applications such as tutoring systems and language learning applications.

Additionally, consistent with the limitations expressed in this policy and with teacher consent, students may also use technology to assist with assessments, homework, and/or makeup work or other uses approved by the teacher.

However, a student with a disability shall be permitted to use technology for any purpose identified in the student's individualized education program as a tool to support the student's learning.

If an employee suspects that a student has used technology in violation of this policy, the student shall be given the opportunity to demonstrate that the use of technology was in accordance with this policy.

Any information acquired from an employee's use of technology in determining whether a student has committed an act of academic dishonesty shall be shared with the student, and the student's parent/guardian as appropriate.

The Superintendent or designee may provide training to staff regarding the use of technology to improve education, including the detection of plagiarism and sensitivity to potential discrimination from algorithmic bias.

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*Policy Reference Disclaimer:*

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

**State**

*Ed. Code 35291-35291.5*

*Ed. Code 56341.1*

*Federal*

*20 USC 1401*

**Description**

*Rules*

*Assistive technology devices for a student with a disability*

*Description*

*Assistive technology device; definition*

**Management Resources**

*Metropolitan Ed. Research Consortium  
Publication*

*USDOE Office of Educational Technology  
Publication*

*Website*

*Website*

**Description**

*Balancing the Benefits and Risks of AI Large Language Models in K12  
Public Schools, 2023*

*Artificial Intelligence and the Future of Teaching and Learning:  
Insights and Recommendations, May 2023*

*Metropolitan Educational Research Consortium*

*CSBA District and County Office of Education Legal Services*

**Cross References**

**Code**

*5131*

*5131.8*

*5137*

*5144*

*6000*

*6141*

*6154*

*6159*

*6162.5*

*6162.54*

*6162.6*

*6163.4*

**Description**

*Conduct*

*Mobile Communication Devices*

*Positive School Climate*

*Discipline*

*Concepts and Roles*

*Curriculum Development and Evaluation*

*Homework/Makeup Work*

*Individualized Education Program*

*Student Assessment*

*Test Integrity/Test Preparation*

*Use of Copyrighted Materials*

*Student Use Of Technology*

# LAKESIDE UNION SCHOOL DISTRICT

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**Governing Board Meeting Date:** 4/11/24

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**Agenda Item:**

Administrative Regulation and Exhibit 5145.71: Title IX Sexual Harassment Complaint Procedures

**Background (Describe purpose/rationale of the agenda item):**

Adoption: Regulation updated to clarify that a sexual harassment complaint that is dismissed or denied under Title IX may still be subject to review under state law pursuant to AR 4030 - Nondiscrimination in Employment and thus the two procedures should be implemented concurrently in order to meet the applicable timelines. Regulation also updated to clarify that the applicability of the Title IX sexual harassment complaint procedures is limited to conduct that allegedly occurs in an education program or activity over which the district exercises control; revise the timeframe for concluding the complaint process from 45 to 60 days; reflect the right to pursue civil law remedies; and add the requirement to maintain a record of any actions, including supportive measures, taken in response to a report or formal complaint of sexual harassment. NEW - Exhibit 4119.12/4219.12/4319.12 - Title IX Sexual Harassment Complaint Procedures New exhibit presents a sample of the required notification to employees, job applicants, and employee organizations regarding the district's Title IX sexual harassment policy, the district's Title IX coordinator, and grievance procedures pursuant to 34 CFR 106.8.

**Fiscal Impact (Cost):**

N/A

**Funding Source:**

N/A

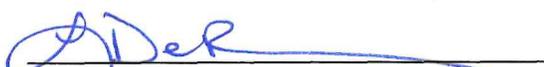
**Recommended Action:**

- |                                                     |                                                                                        |
|-----------------------------------------------------|----------------------------------------------------------------------------------------|
| <input type="checkbox"/> <b>Informational</b>       | <input type="checkbox"/> <b>Denial</b>                                                 |
| <input type="checkbox"/> <b>Discussion</b>          | <input type="checkbox"/> <b>Ratification</b>                                           |
| <input type="checkbox"/> <b>Approval</b>            | <input type="checkbox"/> <b>Explanation:</b> <a href="#">Click here to enter text.</a> |
| <input checked="" type="checkbox"/> <b>Adoption</b> |                                                                                        |

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**Originating Department/School:** Superintendent's Office

**Submitted/Recommended By:**

  
Lisa DeRosier, Executive Assistant

**Approved for Submission to the Governing Board:**

  
Dr. Rhonda Taylor, Superintendent

**Reviewed by Cabinet Member:** \_\_\_\_\_

**TITLE IX SEXUAL HARASSMENT COMPLAINT PROCEDURES**

The complaint procedures described in this administrative regulation shall be used to address any complaint governed by Title IX of the Education Amendments of 1972 alleging that a student, while in an education program or activity in which a district school exercises substantial control over the context and respondent, was subjected to one or more of the following forms of sexual harassment: (34 CFR 106.30, 106.44)

1. A district employee conditioning the provision of a district aid, benefit, or service on the student's participation in unwelcome sexual conduct
2. Unwelcome conduct determined by a reasonable person to be so severe, pervasive, and objectively offensive that it effectively denies a student equal access to the district's education program or activity
3. Sexual assault, dating violence, domestic violence, or stalking as defined in 20 USC 1092 or 34 USC 12291

All other sexual harassment complaints or allegations brought by or on behalf of students shall be investigated and resolved in accordance with BP/AR 1312.3 - Uniform Complaint Procedures. The determination of whether the allegations meet the definition of sexual harassment under Title IX shall be made by the district's Title IX Coordinator.

Because the complainant has a right to pursue a complaint under BP/AR 1312.3 for any allegation that is dismissed or denied under the Title IX complaint procedure, the Title IX Coordinator shall ensure that all requirements and timelines for BP/AR 1312.3 are concurrently met while implementing the Title IX procedure.

**Reporting Allegations/Filing a Formal Complaint**

A student who is the alleged victim of sexual harassment or the student's parent/guardian may submit a report of sexual harassment to the district's Title IX Coordinator using the contact information listed in AR 5145.7 - Sexual Harassment or to any other available school employee, who shall forward the report to the Title IX Coordinator within one day of receiving the report.

Upon receiving such a report, the Title IX Coordinator shall inform the complainant of the right to file a formal complaint and the process for filing a formal complaint. (34 CFR 106.44)

A formal complaint, with the complainant's physical or digital signature, may be filed with the Title IX Coordinator in person, by mail, by email, or by any other method authorized by the district. (34 CFR 106.30)

Even if the alleged victim chooses not to file a formal complaint, the Title IX Coordinator shall file a formal complaint in situations when a safety threat exists. In addition, the Title IX Coordinator may file a formal complaint in other situations as permitted under the Title IX regulations, including as part of the district's obligation to not be deliberately indifferent to

known allegations of sexual harassment. In such cases, the Title IX Coordinator shall provide the alleged victim notices as required by the Title IX regulations at specific points in the complaint process.

The Title IX Coordinator, investigator, decision-maker, or a facilitator of an informal resolution process shall not have a conflict of interest or bias for or against complainants or respondents generally or an individual complainant or respondent. Such persons shall receive training in accordance with 34 CFR 106.45. (34 CFR 106.45)

### **Supportive Measures**

Upon receipt of a report of Title IX sexual harassment, the Title IX Coordinator shall promptly contact the complainant to discuss the availability of supportive measures and shall consider the complainant's wishes with respect to the supportive measures implemented. Supportive measures shall be offered as appropriate, as reasonably available, and without charge to the complainant or the respondent before or after the filing of a formal complaint or where no formal complaint has been filed. Such measures shall be nondisciplinary, nonpunitive, and designed to restore or preserve equal access to the district's education program or activity without unreasonably burdening the other party, including measures designed to protect the safety of all parties or the district's educational environment or to deter sexual harassment. Supportive measures may include, but are not limited to, counseling, course-related adjustments, modifications of class schedules, mutual restrictions on contact, increased security, and monitoring of certain areas of the campus. (34 CFR 106.30, 106.44)

The district shall maintain as confidential any supportive measures provided to the complainant or respondent, to the extent that maintaining such confidentiality would not impair the district's ability to provide the supportive measures. (34 CFR 106.30)

### **Emergency Removal from School**

A student shall not be disciplined for alleged sexual harassment under Title IX until the investigation has been completed. However, on an emergency basis, the district may remove a student from the district's education program or activity, provided that the district conducts an individualized safety and risk analysis, determines that removal is justified due to an immediate threat to the physical health or safety of any student or other individual arising from the allegations, and provides the student with notice and an opportunity to challenge the decision immediately following the removal. This authority to remove a student does not modify a student's rights under the Individuals with Disabilities Education Act or Section 504 of the Rehabilitation Act of 1973. (34 CFR 106.44)

If a district employee is the respondent, the employee may be placed on administrative leave during the pendency of the formal complaint process. (34 CFR 106.44)

### **Dismissal of Complaint**

The Title IX Coordinator shall dismiss a formal complaint if the alleged conduct would not constitute sexual harassment as defined in 34 CFR 106.30 even if proved. The Title IX Coordinator shall also dismiss any complaint in which the alleged conduct did not occur in the district's education program or activity or did not occur against a person in the United States,

and may dismiss a formal complaint if the complainant notifies the district in writing that the complainant would like to withdraw the complaint or any allegations in the complaint, the respondent is no longer enrolled or employed by the district, or sufficient circumstances prevent the district from gathering evidence sufficient to reach a determination with regard to the complaint. (34 CFR 106.45)

Upon dismissal, the Title IX Coordinator shall promptly send written notice of the dismissal and the reasons for the dismissal simultaneously to the parties, and shall inform them of their right to appeal the dismissal of a formal complaint or any allegation in the complaint in accordance with the appeal procedures described in the section "Appeals" below. (34 CFR 106.45)

If a complaint is dismissed, the conduct may still be addressed pursuant to BP/AR 1312.3 - Uniform Complaint Procedures as applicable.

### **Informal Resolution Process**

When a formal complaint of sexual harassment is filed, the district may offer an informal resolution process, such as mediation, at any time prior to reaching a determination regarding responsibility. The district shall not require a party to participate in the informal resolution process or to waive the right to an investigation and adjudication of a formal complaint. (34 CFR 106.45)

The district may facilitate an informal resolution process provided that the district: (34 CFR 106.45)

1. Provides the parties with written notice disclosing the allegations, the requirements of the informal resolution process, the right to withdraw from the informal process and resume the formal complaint process, and any consequences resulting from participating in the informal resolution process, including that records will be maintained or could be shared.
2. Obtains the parties' voluntary, written consent to the informal resolution process
3. Does not offer or facilitate an informal resolution process to resolve allegations that an employee sexually harassed a student

### **Written Notice**

If a formal complaint is filed, the Title IX Coordinator shall provide the known parties with written notice of the following: (34 CFR 106.45)

1. The district's complaint process, including any informal resolution process
2. The allegations potentially constituting sexual harassment with sufficient details known at the time, including the identity of parties involved in the incident if known, the conduct allegedly constituting sexual harassment, and the date and location of the alleged incident if known. Such notice shall be provided with sufficient time for the parties to prepare a response before any initial interview. If, during the course of the

investigation, new Title IX allegations arise about the complainant or respondent that are not included in the initial notice, the Title IX Coordinator shall provide notice of the additional allegations to the parties.

3. A statement that the respondent is presumed not responsible for the alleged conduct and that a determination regarding responsibility is made at the conclusion of the complaint process
4. The opportunity for the parties to have an advisor of their choice who may be, but is not required to be, an attorney, and the ability to inspect and review evidence
5. The prohibition against knowingly making false statements or knowingly submitting false information during the complaint process

The above notice shall also include the name of the investigator, facilitator of an informal process, and decision-maker and shall inform the parties that, if at any time a party has concerns regarding conflict of interest or bias regarding any of these persons, the party should immediately notify the Title IX Coordinator.

### **Investigation Procedures**

During the investigation process, the district's designated investigator shall: (34 CFR 106.45)

1. Provide an equal opportunity for the parties to present witnesses, including fact and expert witnesses, and other inculpatory and exculpatory evidence
2. Not restrict the ability of either party to discuss the allegations under investigation or to gather and present relevant evidence
3. Provide the parties with the same opportunities to have others present during any grievance proceeding, including the opportunity to be accompanied to any related meeting or proceeding by the advisor of their choice, who may be, but is not required to be, an attorney
4. Not limit the choice or presence of an advisor for either the complainant or respondent in any meeting or grievance proceeding, although the district may establish restrictions regarding the extent to which the advisor may participate in the proceedings as long as the restrictions apply equally to both parties
5. Provide, to a party whose participation is invited or expected, written notice of the date, time, location, participants, and purpose of all investigative interviews or other meetings, with sufficient time for the party to prepare to participate
6. Send in an electronic format or hard copy to both parties and their advisors, if any, the evidence obtained as part of the investigation that is directly related to the allegations raised in the complaint, and provide the parties at least 10 days to submit a written response for the investigator to consider prior to the completion of the investigative report

7. Objectively evaluate all relevant evidence, including both inculpatory and exculpatory evidence, and determine credibility in a manner that is not based on a person's status as a complainant, respondent, or witness
8. Create an investigative report that fairly summarizes relevant evidence and, at least 10 days prior to the determination of responsibility, send to the parties and their advisors, if any, the investigative report in an electronic format or a hard copy, for their review and written response

Questions and evidence about the complainant's sexual predisposition or prior sexual behavior are not relevant, unless such questions and evidence are offered to prove that someone other than the respondent committed the conduct alleged by the complainant or if the questions and evidence concern specific incidents of the complainant's prior sexual behavior with respect to the respondent and are offered to prove consent. (34 CFR 106.45)

Privacy rights of all parties to the complaint shall be maintained in accordance with applicable state and federal laws.

If the complaint is against an employee, rights conferred under an applicable collective bargaining agreement shall be applied to the extent they do not conflict with the Title IX requirements.

### **Written Decision**

The Superintendent shall designate an employee as the decision-maker to determine responsibility for the alleged conduct, who shall not be the Title IX Coordinator or a person involved in the investigation of the matter. (34 CFR 106.45)

After the investigative report has been sent to the parties but before reaching a determination regarding responsibility, the decision-maker shall afford each party the opportunity to submit written, relevant questions that the party wants asked of any party or witness, provide each party with the answers, and allow for additional, limited follow-up questions from each party.

The decision-maker shall issue, and simultaneously provide to both parties, a written decision as to whether the respondent is responsible for the alleged conduct. (34 CFR 106.45)

The written decision shall be issued within 60 calendar days of the receipt of the complaint.

The timeline may be temporarily extended for good cause with written notice to the complainant and respondent of the extension and the reasons for the action. (34 CFR 106.45)

In making this determination, the decision-maker shall use the "preponderance of the evidence" standard for all formal complaints of sexual harassment. The same standard of evidence shall be used for formal complaints against students as for complaints against employees. (34 CFR 106.45)

The written decision shall include the following: (34 CFR 106.45)

1. Identification of the allegations potentially constituting sexual harassment as defined in 34 CFR 106.30
2. A description of the procedural steps taken from receipt of the formal complaint through the written decision, including any notifications to the parties, interviews with parties and witnesses, site visits, methods used to gather other evidence, and hearings held if the district includes hearings as part of the grievance process
3. Findings of fact supporting the determination
4. Conclusions regarding the application of the district's code of conduct or policies to the facts
5. A statement of, and rationale for, the result as to each allegation, including a decision regarding responsibility, any disciplinary sanctions the district imposes on the respondent, and whether remedies designed to restore or preserve equal access to the district's educational program or activity will be provided by the district to the complainant
6. The district's procedures and permissible bases for the complainant and respondent to appeal

## **Appeals**

Either party may appeal the district's decision or dismissal of a formal complaint or any allegation in the complaint, if the party believes that a procedural irregularity affected the outcome, new evidence is available that could affect the outcome, or a conflict of interest or bias by the Title IX Coordinator, investigator(s), or decision-maker(s) affected the outcome. If an appeal is filed, the district shall: (34 CFR 106.45)

1. Notify the other party in writing when an appeal is filed and implement appeal procedures equally for both parties
2. Ensure that the decision-maker(s) for the appeal is trained in accordance with 34 CFR 106.45 and is not the same decision-maker(s) who reached the determination regarding responsibility or dismissal, the investigator(s), or the Title IX Coordinator
3. Give both parties a reasonable, equal opportunity to submit a written statement in support of, or challenging, the outcome
4. Issue a written decision describing the result of the appeal and the rationale for the result
5. Provide the written decision simultaneously to both parties

An appeal must be filed in writing within 10 calendar days of receiving the notice of the decision or dismissal, stating the grounds for the appeal and including any relevant documentation in support of the appeal. Appeals submitted after this deadline are not timely and shall not be considered.

A written decision shall be provided to the parties within 20 calendar days from the receipt of the appeal.

The district's decision may be appealed to the California Department of Education within 30 days of the written decision in accordance with BP/AR 1312.3.

Either party has the right to file a complaint with the U.S. Department of Education's Office for Civil Rights within 180 days of the date of the most recently alleged misconduct.

The complainant shall be advised of any civil law remedies, including, but not limited to, injunctions, restraining orders, or other remedies or orders that may be available under state or federal antidiscrimination laws, if applicable.

### **Remedies**

When a determination of responsibility for sexual harassment has been made against the respondent, the district shall provide remedies to the complainant. Such remedies may include the same individualized services described above in the section "Supportive Measures," but need not be nondisciplinary or nonpunitive and need not avoid burdening the respondent. (34 CFR 106.45)

### **Corrective/Disciplinary Actions**

The district shall not impose any disciplinary sanctions or other actions against a respondent, other than supportive measures as described above in the section "Supportive Measures," until the complaint procedure has been completed and a determination of responsibility has been made. (34 CFR 106.44)

For students in grades 4-12, discipline for sexual harassment may include suspension and/or expulsion. After the completion of the complaint procedure, if it is determined that a student at any grade level has committed sexual assault or sexual battery at school or at a school activity off school grounds, the principal or Superintendent shall immediately suspend the student and shall recommend expulsion. (Education Code 48900.2, 48915)

Other actions that may be taken with a student who is determined to be responsible for sexual harassment include, but are not limited to:

1. Transfer from a class or school as permitted by law
2. Parent/guardian conference
3. Education of the student regarding the impact of the conduct on others
4. Positive behavior support
5. Referral of the student to a student success team
6. Denial of participation in extracurricular or cocurricular activities or other privileges as permitted by law

When an employee is found to have committed sexual harassment or retaliation, the district shall take appropriate disciplinary action, up to and including dismissal, in accordance with applicable law and collective bargaining agreement.

## **Record-Keeping**

The Superintendent or designee shall maintain, for a period of seven years: (34 CFR 106.45)

1. A record of all reported cases and Title IX investigations of sexual harassment, any determinations of responsibility, any audio or audiovisual recording and transcript if applicable, any disciplinary sanctions imposed, any remedies provided to the complainant, and any appeal or informal resolution and the results therefrom
2. A record of any actions, including supportive measures, taken in response to a report or formal complaint of sexual harassment, including the district's basis for its conclusion that its response was not deliberately indifferent, the measures taken that were designed to restore or preserve equal access to the education program or activity, and, if no supportive measures were provided to the complainant, the reasons that such a response was not unreasonable in light of the known circumstances
3. All materials used to train the Title IX Coordinator, investigator(s), decision-maker(s), and any person who facilitates an informal resolution process. The district shall make such training materials publicly available on its web site, or if the district does not maintain a web site, available upon request by members of the public.

**TITLE IX SEXUAL HARASSMENT COMPLAINT PROCEDURES**

**NOTICE OF TITLE IX SEXUAL HARASSMENT POLICY**

The Code of Federal Regulations, Title 34, Section 106.8 requires the district to issue the following notification to students at all grade levels and their parents/guardians:

The district does not discriminate on the basis of sex in any education program or activity that it operates. The prohibition against discrimination on the basis of sex is required by federal law (20 USC 1681-1688; 34 CFR Part 106) and extends to employment. The district also prohibits retaliation against any student for filing a complaint or exercising any right granted under Title IX.

Title IX requires a school district to take immediate and appropriate action to address any potential Title IX violations that are brought to its attention. Any inquiries about the application of Title IX, this notice, and who is protected by Title IX may be referred to the district's Title IX Coordinator, to the Assistant Secretary for Civil Rights of the U.S. Department of Education or both.

The district has designated and authorized the following employee as the district's Title IX Coordinator to address concerns or inquiries regarding discrimination on the basis of sex, including sexual harassment, sexual assault, dating violence, domestic violence, and stalking:

Dr. Patricia Fernandez, Director of Student Support Services  
12335 Woodside Avenue, Lakeside, CA 92040  
(619) 390-2600  
[pfernandez@lsusd.net](mailto:pfernandez@lsusd.net)

Any individual may report sex discrimination, including sexual harassment, to the Title IX Coordinator or any other school employee at any time, including during non-business hours, by mail, phone, or email. During district business hours, reports may also be made in person. Upon receiving an allegation of sexual harassment, the Title IX Coordinator will promptly notify the parties, in writing, of the applicable district complaint procedure.

To view an electronic copy of the district's policies and administrative regulations on sexual harassment, including the grievance process that complies with 34 CFR 106.45, please see BP/AR 5145.7 - Sexual Harassment and AR 5145.71 - Title IX Sexual Harassment Complaint Procedures on the district's web site at [www.lsusd.net](http://www.lsusd.net).

To inspect or obtain a copy of the district's sexual harassment policies and administrative regulations, please contact: [pfernandez@lsusd.net](mailto:pfernandez@lsusd.net); (619) 390-2600.

Materials used to train the Title IX Coordinator, investigator(s), decision-maker(s), and any person who facilitates an informal resolution process are also publicly available on the district's web site or at the district office upon request.

# LAKESIDE UNION SCHOOL DISTRICT

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**Governing Board Meeting Date:** April 11th, 2024

**Agenda Item:**

Enrollment Report Month 7 (2/5/2024 – 3/1/2024)

**Background (Describe purpose/rationale of the agenda item):**

**Fiscal Impact (Cost):**

**Funding Source:**

**Addresses Emphasis Goal(s):**

- #1:** Academic Achievement       **#2:** Social Emotional       **#3:** Physical Environments

**Recommended Action:**

- Informational**                       **Denial/Rejection**  
 **Discussion**                         **Ratification**  
 **Approval**                             **Explanation:** [Click here to enter text.](#)  
 **Adoption**

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**Originating Department/School:** Business Services

**Submitted/Recommended By:**

**Approved for Submission to the Governing Board:**

  
\_\_\_\_\_  
**Lisa Davis, Assistant Superintendent**

  
\_\_\_\_\_  
**Dr. Rhonda Taylor, Superintendent**

**Reviewed by Cabinet Member** \_\_\_\_\_

LAKESIDE UNION SCHOOL DISTRICT						MONTH 7					2/5/2024 - 3/1/2024		DATE: 3/28/2024
											M7 23/24	M7 22/23	
SCHOOL	TK	K	1	2	3	4	5	6	7	8	TOTAL	TOTAL	VARIANCE
LAKESIDE FARMS	68	92	100	109	103	89	98				659	642	17
LAKEVIEW	39	92	95	124	99	110	95				654	657	-3
LEMON CREST	23	66	70	68	67	72	76				442	497	-55
LINDO PARK	24	57	61	60	72	73	80				427	455	-28
RIVERVIEW				132	124	130	111				497	523	-26
WINTER GARDENS	125	113	45								283	307	-24
LAKESIDE MIDDLE								251	225	198	674	673	1
TIERRA DEL SOL								268	219	263	750	714	36
DREAM ACADEMY	3	10	9	9	6	11	12	8	10	9	87	54	33
NPS/RTC		1	0	1	0	0	2	1	1	0	6	5	1
<b>DISTRICT TOTAL</b>	<b>282</b>	<b>431</b>	<b>380</b>	<b>503</b>	<b>471</b>	<b>485</b>	<b>474</b>	<b>528</b>	<b>455</b>	<b>470</b>	<b>4,479</b>	<b>4,527</b>	<b>-48</b>
<b>YEAR OVER YEAR COMPARISON</b>													
MONTH	AUG M0	AUG M1	SEP M2	OCT M3	NOV M4	DEC M5	JAN M6	FEB M7	MAR M8	APR M9	MAY M10	JUN M11	
2023-2024	4,544	4,543	4,543	4,527	4,517	4,473	4,485	4,479					
2022-2023	4,566	4,519	4,517	4,535	4,531	4,513	4,543	4,527	4,532	4,528	4,516	4,497	
2021-2022	4,522	4,511	4,515	4,562	4,553	4,529	4,526	4,471	4,482	4,479	4,472	4,466	
2020-2021	4,655	4,674	4,673	4,668	4,665	4,659	4,654	4,659	4,642	4,659	4,661	4,652	
2019-2020	-	4,985	4,986	4,966	4,966	5,042	5,036	5,031	5,036	5,031	5,018	5,015	
2018-2019	-	5,073	5,054	5,054	5,046	5,098	5,110	5,098	5,090	5,081	5,070	5,028	
2017-2018	-	5,164	5,179	5,161	5,153	5,211	5,208	5,183	5,159	5,151	5,135	5,101	
2016-2017	-	5,051	5,039	5,045	5,031	5,103	5,091	5,080	5,059	5,071	5,050	5,023	
2015-2016	-	5,087	5,100	5,083	5,077	5,138	5,124	5,139	5,121	5,107	5,081	5,056	
2014-2015	-	5,003	5,005	4,010	4,992	4,986	5,040	5,008	5,021	5,015	5,006	-	
2013-2014	-	4,835	4,817	4,823	4,825	4,848	4,834	4,790	4,818	4,813	4,790	-	
<b>BARONA INDIAN CHARTER SCHOOL</b>	<b>GRADE</b>	<b>TK/K</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>TOTAL</b>		
		16	7	9	11	13	6	10	8	4	84		
<b>RIVER VALLEY CHARTER SCHOOL</b>	<b>GRADE</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	<b>11</b>	<b>12</b>				<b>TOTAL</b>		
		24	39	38	41	45	41				228		

# LAKESIDE UNION SCHOOL DISTRICT

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**Governing Board Meeting Date:** 4/11/24

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**Agenda Item:**

Board Policy and Administrative Regulation 0460: Local Control and Accountability Plan

**Background (Describe purpose/rationale of the agenda item):**

First Reading: Policy updated to reflect NEW LAW (SB 114, 2023) which (1) requires numerous changes to the local control and accountability plan (LCAP) for use in the 2024-25 school year, and (2) adds "long-term English learners," defined by NEW LAW (SB 141, 2023) as a student who has not attained English language proficiency within seven years of initial classification as an English learner, as a numerically significant subgroup. Policy also updated to add headers for clarity, align the structure of the policy with the LCAP process, and clarify references to the annual update and budget overview for parents/guardians.

Regulation updated to reflect NEW LAW (SB 114, 2023) which (1) requires numerous changes to the local control and accountability plan (LCAP) for use in the 2024-25 school year, and (2) adds "long-term English learners," defined by NEW LAW (SB 141, 2023) as a student who has not attained English language proficiency within seven years of initial classification as an English learner, as a numerically significant subgroup. Regulation also updated to add "Timeline" section to provide greater specificity regarding required LCAP dates and recommended dates based on best practice, and reflect NEW LAW (SB 609, 2023) which requires districts to post the LCAP on the performance overview portion of the California School Dashboard.

**Fiscal Impact (Cost):**

N/A

**Funding Source:**

N/A

**Recommended Action:**

- |                                                       |                                                                                        |
|-------------------------------------------------------|----------------------------------------------------------------------------------------|
| <input type="checkbox"/> <b>Informational</b>         | <input type="checkbox"/> <b>Denial</b>                                                 |
| <input checked="" type="checkbox"/> <b>Discussion</b> | <input type="checkbox"/> <b>Ratification</b>                                           |
| <input type="checkbox"/> <b>Approval</b>              | <input type="checkbox"/> <b>Explanation:</b> <a href="#">Click here to enter text.</a> |
| <input type="checkbox"/> <b>Adoption</b>              |                                                                                        |

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**Originating Department/School:** Superintendent's Office

**Submitted/Recommended By:**

  
Lisa DeRosier, Executive Assistant

**Approved for Submission to the Governing Board:**

  
Dr. Rhonda Taylor, Superintendent

**Reviewed by Cabinet Member:** 

**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 comprehensive, data-driven planning process shall be used to identify annual goals and specific actions which are aligned with the district budget and facilitate continuous improvement of district practices.

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

The LCAP **and the annual update** shall focus on improving outcomes for all students, particularly those who are "unduplicated students" or are part of any numerically significant student subgroup that is at risk of or is underperforming. **(Education Code 52060, 52064)**

~~Unduplicated students include students~~ **An "unduplicated student" is a student who are is eligible for free or reduced-price meals, who is an English learners, and or who is a foster youth as defined in Education Code 42238.01 for purposes of the local control funding formula (LCFF).** (Education Code 42238.02)

Numerically significant student subgroups include ethnic subgroups, socioeconomically disadvantaged students, English learners, **long-term English learners**, students with disabilities, foster youth, and ~~homeless~~ **students experiencing homelessness**, when there are at least 30 students in the subgroup or at least 15 foster youth or ~~homeless~~ **students experiencing homelessness, or long-term English learners.** (Education Code 52052)

**Beginning July 1, 2025, if the district is identified by the California Department of Education (CDE) as needing an improvement plan pursuant to 34 CFR 300.600-300.647, the Board shall adopt, and update on an annual basis, an individual with Disabilities Education Act (IDEA) Addendum, based on the template adopted by SBE. However, if the district adopts an improvement plan after being identified, but before July 1, 2025, the IDEA Addendum shall be developed upon expiration of the adopted improvement plan, but no later than July 1, 2028, whichever occurs first. The IDEA addendum shall be developed, reviewed, and approved in conjunction with and in the same manner as the LCAP and the annual update, and shall be submitted to CDE within 15 days of adoption by the Board. (Education Code 52064.3)**

The Superintendent or designee shall review the school 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)

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.

As part of the ~~LCAP~~ adoption **of the LCAP** and **the** annual update ~~to the LCAP~~, the Board shall separately adopt ~~an LCEE~~ **a local control funding formula** budget overview for parents/guardians, based on the template developed by ~~the~~ SBE, which includes specified information relating to the district's budget. The budget overview shall be adopted, reviewed, and approved in the same manner as the LCAP and the annual update. (~~Education Code 52064.1~~)

~~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)~~

### **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 numbers of students in student subgroups, disaggregated data on student achievement levels, and information about current programs and expenditures.~~

### **Advisory Committees**

~~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)~~

### **Public Review and Input**

The Board shall establish a parent advisory committee, ~~to provide advice on the LCAP. The committee~~ **which** shall be composed of a majority of parents/guardians and shall include parents/guardians of unduplicated students as ~~defined above and~~ parents/guardians of students ~~with disabilities and~~ **parents/guardians of students with disabilities**. (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, which shall be composed of a majority of parents/guardians of English learners. (Education Code 52063; 5 CCR 15495)**

**Beginning July 1, 2024, unless a student advisory committee is established to provide advice to the Board and Superintendent, two students shall be included as full members**

of the parent advisory committee. The students shall serve for a renewable term of one full school year. (Education Code 52063)

**Student members of the parent advisory committee or the student advisory committee shall represent the diversity of the district's students, including geographical, socioeconomic, cultural, physical, and educational diversity, and particular effort shall be made to reach out to at-risk or disadvantaged students to serve as members of such committees. (Education Code 52063)**

~~Beginning July 1, 2025, if the district is identified by the California Department of Education (CDE) as needing an improvement plan pursuant to 34 CFR 300.600-300.647, the Board shall adopt, and update on an annual basis, an Individual with Disabilities Education Act (IDEA) Addendum, based on the template adopted by SBE. However, if the district adopts an improvement plan after being identified, but before July 1, 2025, the IDEA Addendum shall be developed upon expiration of the adopted improvement plan, but no later than July 1, 2028, whichever occurs first. The IDEA addendum shall be developed, reviewed, and approved in conjunction with and in the same manner as the LCAP and the annual update to the LCAP, and shall be submitted to CDE within 15 days of adoption by the Board. (Education Code 52064.3)~~

~~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 to review and comment on the LCAP. (Education Code 52063; 5 CCR 15495)~~

The Superintendent or designee shall present the LCAP ~~to the~~ **and the annual update to each of these** committee(s) before ~~it is~~ **they are** submitted to the Board for adoption, and shall respond in writing to comments received from the committee(s).

### **LCAP Development and Consultation**

~~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)~~

**The Superintendent or designee shall gather data and information needed for effective and meaningful development of the LCAP 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 and the annual update. 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 and committees, and/or meetings with student government bodies or other groups representing students. (Education Code 52060; 5 CCR 15495)**

As part of the parent/guardian 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 Superintendent or designee shall consult with the administrator(s) of the special education local plan area of which the district is a member to ensure that specific actions for students with disabilities are included in the LCAP and are consistent with strategies included in the annual assurances support plan for the education of students with disabilities. (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 and the annual update. 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 and the annual update shall be provided in the primary language of parents/guardians when required by Education Code 48985. (Education Code 52062)**

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 **and the annual update**. The public hearing shall be held at the same meeting as the budget hearing required pursuant to Education Code 42127 and **AR Board Policy 3100 - Budget**. (Education Code 42127, 52062)

#### **~~Adoption of the Plan and Submission~~**

The Board shall adopt the LCAP **and the annual update** 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. (~~Education Code 52062~~)

~~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 **and the annual update**, the district budget, and the LCFF budget overview for parents/guardians, the Board shall file the LCAP, **the annual update**, and the budget, and the budget overview with the County Superintendent of Schools. (Education Code 42127, 52064.1, 52070)

If the County Superintendent sends, by August 15, a written request for clarification of the contents of the LCAP **and the annual update**, 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)

If the County Superintendent does not approve the district's LCAP **and the annual update**, the Board shall accept technical assistance from the County Superintendent focused on revising the ~~plan so that it can be approved~~ **LCAP and the annual update so that they can be approved**. (Education Code 52071)

### Revisions

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

### Monitoring Progress and Complaints

The Superintendent or designee shall report to the Board, at least annually in accordance with the timeline and indicators established by the Superintendent 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 reported on the California School Dashboard. Evaluation data shall be used to recommend any necessary revisions to the LCAP.

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

### Technical Assistance

~~The Superintendent or designee shall seek and/or~~ **If the district's LCAP and the annual update are not approved, the district shall** accept technical assistance or other intervention that may be required pursuant to Education Code 52071 ~~or 52072 when a school or a numerically significant student subgroup is not making sufficient progress toward the goals in the LCAP.~~

#### State

5 CCR 15494-15497

Ed. Code 17002

Ed. Code 305-306

Ed. Code 33430-33436

Ed. Code 41020

Ed. Code 41320-41322

#### Description

Local control and accountability plan and spending requirements

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

English language education

Learning Communities for School Success Program; grants for LCAP implementation

Requirement for annual audit

Emergency apportionments

Ed. Code 42127  
Ed. Code 42238.01-42238.07  
Ed. Code 44258.9  
Ed. Code 47604.33  
Ed. Code 47606.5  
Ed. Code 48985  
Ed. Code 51210  
Ed. Code 51220  
Ed. Code 52052  
Ed. Code 52059.5  
Ed. Code 52060-52077  
Ed. Code 52302  
Ed. Code 52372.5  
Ed. Code 54692  
Ed. Code 60119

Ed. Code 60605.8

Ed. Code 64001

**Ed. Code 60900**

Ed. Code 99300-99301  
W&I Code 300  
Federal  
20 USC 6311  
20 USC 6312  
20 USC 6826  
34 CFR 300.600-300.647

**Management Resources**

California Department of Education Publication  
California Department of Education Publication

California Department of Education Publication  
California Department of Education Publication

California Department of Education Publication

California Department of Education Publication

California Department of Education Publication

California Department of Education Publication  
California Department of Education Publication

CSBA Publication

CSBA Publication

CSBA Publication

Website

Website

Public hearing on budget adoption  
Local control funding formula  
County superintendent review of teacher assignment  
Submission of reports by charter schools  
Charter schools; local control and accountability plan  
Notices to parents in language other than English  
Course of study for grades 1-6  
Course of study for grades 7-12  
Numerically significant student subgroups  
Statewide system of support  
Local control and accountability plan  
Regional occupational centers and programs  
Linked learning program  
Partnership academies  
Sufficiency of textbooks and instructional materials;  
hearing and resolution  
California Assessment of Academic Achievement;  
Academic Content Standards Commission  
School plan for student achievement; consolidated  
application programs  
**California Longitudinal Pupil Achievement Data  
System**  
Early Assessment Program  
Dependent child of the court  
Description  
State plan  
Local educational agency plan  
Title III funds; local plans  
Education of students with disabilities; monitoring,  
enforcement, confidentiality, and program information

**Description**

California School Accounting Manual  
California Career Technical Education Model  
Curriculum Standards, 2013  
LCFF Frequently Asked Questions  
Local Control and Accountability Plan and Annual  
Update (LCAP) Template  
California Common Core State Standards: English  
Language Arts and Literacy in History/Social Studies,  
Science, and Technical Subjects, rev. 2013  
California Common Core State Standards: Mathematics,  
rev. 2013  
California English Language Development Standards,  
2012  
California School Dashboard  
Family Engagement Framework: A Tool for California  
School Districts, 2014  
The California School Dashboard and Small Districts,  
October 2018  
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  
CSBA District and County Office of Education Legal  
Services  
California School Dashboard

Website  
Website

CSBA  
California Department of Education

**Cross References:**

<b><u>Code</u></b>	<b><u>Description</u></b>
0000	Vision
0400	Comprehensive Plans
0415	Equity
0420	School Plans/Site Councils
0420.4	Charter School Authorization
0420.41	Charter School Oversight
0420.41-E(1)	Charter School Oversight
0430	Comprehensive Local Plan For Special Education
0440	District Technology Plan
0450	Comprehensive Safety Plan
0500	Accountability
0520	Intervention in Underperforming Schools
0520.1	Comprehensive and Targeted School Improvement
1100	Communication With The Public
1113	District And School Web Sites
1113-E(1)	District And School Web Sites
1220	Citizen Advisory Committees
1312.3	Uniform Complaint Procedures
1312.3-E (1)	Uniform Complaint Procedures
1312.3-E (2)	Uniform Complaint Procedures
1312.4	Williams Uniform Complaint Procedures
1312.4-E(1)	Williams Uniform Complaint Procedures
1312.4-E(2)	Williams Uniform Complaint Procedures
1340	Access To District Records
2121	Superintendent's Contract
2210	Administrative Discretion Regarding Board Policy
3100	Budget
3110	Transfer Of Funds
3231	Impact Aid
3460	Financial Reports And Accountability
3517	Facilities Inspection
3517-E(1)	Facilities Inspection
3553	Free And Reduced Price Meals
4112.2	Certification
4113	Assignment
4131	Staff Development
4140	Bargaining Units
4231	Staff Development
4240	Bargaining Units
4315	Evaluation/Supervision
4331	Staff Development
4340	Bargaining Units
5030	Student Wellness
5113.1	Chronic Absence And Truancy
5137	Positive School Climate
5144	Discipline
5144.1	Suspension And Expulsion/Due Process
5144.2	Suspension And Expulsion/Due Process (Students With Disabilities)
5145.6	Parent/Guardian Notifications
5145.6-E(1)	Parent/Guardian Notifications
5145.9	Hate-Motivated Behavior

5147	<i>Dropout Prevention</i>
5148.2	<i>Before/After School Programs</i>
6011	<i>Academic Standards</i>
6020	<i>Parent Involvement</i>
6120	<i>Response To Instruction And Intervention</i>
6141.4	<i>International Baccalaureate Program</i>
6141.5	<i>Advanced Placement</i>
6142.92	<i>Mathematics Instruction</i>
6142.93	<i>Science Instruction</i>
6143	<i>Courses Of Study</i>
6146.1	<i>High School Graduation Requirements</i>
6151	<i>Class Size</i>
6152.1	<i>Placement In Mathematics Courses</i>
6153	<i>School-Sponsored Trips</i>
6159	<i>Individualized Education Program</i>
6161.1	<i>Selection And Evaluation Of Instructional Materials</i>
6161.1-E(1)	<i>Selection And Evaluation Of Instructional Materials</i>
6162.5	<i>Student Assessment</i>
6162.51	<i>State Academic Achievement Tests</i>
6163.1	<i>Library Media Centers</i>
6164.2	<i>Guidance/Counseling Services</i>
6164.4	<i>Identification And Evaluation Of Individuals For Special Education</i>
6164.5	<i>Student Success Teams</i>
6164.6	<i>Identification And Education Under Section 504</i>
6171	<i>Title I Programs</i>
6172	<i>Gifted And Talented Student Program</i>
6173	<i>Education For Homeless Children</i>
6173-E(1) 6173-E(2)	<i>Education For Homeless Children</i>
6173.1	<i>Education For Foster Youth</i>
6173.4	<i>Title VI Indian Education Program</i>
6174	<i>Education For English Learners</i>
6177	<i>Summer Learning Programs</i>
6178	<i>Career Technical Education</i>
6179	<i>Supplemental Instruction</i>
6184	<i>Continuation Education</i>
6190	<i>Evaluation Of The Instructional Program</i>
7110	<i>Facilities Master Plan</i>
9230	<i>Orientation</i>
9310	<i>Board Policies</i>
9320	<i>Meetings And Notices</i>

**LOCAL CONTROL AND ACCOUNTABILITY PLAN**

**Goals and Actions Addressing State and Local Priorities**

The district's local control and accountability plan (LCAP) and annual updates 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, **long-term English learners**, students with disabilities, foster youth, and ~~homeless~~ **homeless students experiencing homelessness**. 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
  - 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
  - c. Parent/guardian involvement and family engagement, 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
  - d. Student achievement, as measured by all of the following as applicable:
    - i. Statewide assessments of student achievement
    - ii. The percentage of English learners who make progress toward English proficiency as measured by the SBE-certified assessment of English proficiency
    - iii. The English learner reclassification rate
  - e. Student engagement, as measured by school attendance rates, chronic absenteeism rates, middle school dropout rates, as applicable

- 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
  - 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 funding pursuant to Education Code 42238.02 and 42238.03
  - 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 **Governing Board**.
  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 Superintendent or designee** 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 The California School Dashboard. (Education Code 52060)

**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 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 such 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.

### **Timeline**

**By February 28 of each year, the Superintendent or designee shall provide a report to the Board on the annual update and the budget overview for parents/guardians. The report, which shall be presented to the Board at a regular meeting, shall include all available midyear outcome data related to metrics identified in the current year's LCAP and all available midyear expenditure and implementation data on all actions identified in the current year's LCAP. (Education Code 52062)**

**By May 15, but in no event later than May 31, the Superintendent or designee shall present the drafts of the LCAP and the annual update to the committees listed in the accompanying board policy for review and comment and shall provide each committee with a reasonable date by which each committee shall provide comments on the drafts. The Superintendent or designee shall respond in writing to comments received from the committee(s) no later than the public hearing on the LCAP and the annual update.**

**At the same time as the drafts of the LCAP and the annual update are presented to these committees, 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. The notification shall also provide the deadline by which all written comments must be received, which shall be no later than the deadline for comments from the committee(s). All such written notifications shall be provided in the primary language of parents/guardians when required by Education Code 48985. (Education Code 52062)**

### **Availability of the Plan**

The Superintendent or designee shall prominently post the LCAP, any updates or revisions to the LCAP, including the **annual update**, the IDEA Addendum as applicable, and the **LCFF local control funding formula** budget overview for parents/guardians on the homepage of the district's website **and the performance overview portion of the Dashboard**. (Education Code 52064.1, 52065)

Regulation 0460  
reviewed: July 9, 2015  
revised: ~~July 13, 2023~~

LAKESIDE UNION SCHOOL DISTRICT  
Lakeside, California

# LAKESIDE UNION SCHOOL DISTRICT

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**Governing Board Meeting Date:** 4/11/24

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**Agenda Item:**

Board Policy and Administrative Regulation 1312.3: Uniform Complaint Procedures

**Background (Describe purpose/rationale of the agenda item):**

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

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

**Fiscal Impact (Cost):**

N/A

**Funding Source:**

N/A

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**Recommended Action:**

- Informational
- Discussion
- Approval
- Adoption

- Denial
- Ratification
- Review Click here to enter text.
- Explanation: Click here to enter text.

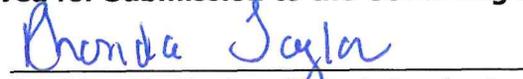
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**Originating Department/School:** Superintendent's Office

**Submitted/Recommended By:**

  
\_\_\_\_\_  
Lisa DeRosier, Executive Assistant

**Approved for Submission to the Governing Board:**

  
\_\_\_\_\_  
Dr. Rhonda Taylor, Superintendent

**Reviewed by Cabinet Member:** 

**UNIFORM COMPLAINT PROCEDURES**

The Governing Board recognizes that the district has the primary responsibility to ensure compliance with applicable state and federal laws and regulations governing educational programs. The Board encourages **the** early resolution of complaints whenever possible. To resolve complaints which may require a more formal process, the Board adopts a uniform system of complaint processes specified in 5 CCR 4600-4670 and the accompanying administrative regulation.

**Complaints Subject to UCP**

The district's uniform complaint procedures (UCP) shall be used to investigate and resolve complaints regarding the following programs and activities:

1. Accommodations for pregnant and parenting students (Education Code 46015)

*(cf. 5146—Married/Pregnant/Parenting Students)*

2. Adult education programs (Education Code 8500-8538, 52334.7, 52500-52617)

*(cf. 6200—Adult Education)*

3. After School Education and Safety programs (Education Code 8482-8484.65)

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

4. Agricultural career technical education (Education Code 52460-52462)

5. Career technical and technical education and career technical and technical training programs (Education Code 52300-52462)

*(cf. 6178—Career Technical Education)*

*(cf. 6178.1—Work-Based Learning)*

6. Child care and development programs (Education Code 8200-~~8488~~ 8498)

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

7. Compensatory education (Education Code 54400)

*(cf. 6171—Title I Programs)*

8. Consolidated categorical aid programs (Education Code 33315; 34 CFR 299.10-299.12)

9. **Course periods without educational content (Education Code 51228.1-51228.3)**

**910.** Discrimination, harassment, intimidation, or bullying in district programs and activities, including in those programs or activities funded directly by or that receive or benefit from any state financial assistance, based on ~~a the~~ person's actual or perceived characteristics of race or ethnicity, color, ancestry, nationality, national origin, immigration status, ethnic group identification, age, religion, marital status, pregnancy, parental status, physical or mental disability, medical condition, sex, sexual orientation, gender, gender identity, gender expression, or genetic information, or any other characteristic identified in Education Code 200 or 220, Government Code 11135, or Penal Code 422.55, or based on the person's association with a person or group with one or more of these actual or perceived characteristics (5 CCR 4610)

*(ef. 0410—Nondiscrimination in District Programs and Activities)*

*(ef. 5145.3—Nondiscrimination/Harassment)*

*(ef. 5145.7—Sexual Harassment)*

*(ef. 5145.71—Title IX Sexual Harassment Complaint Procedures)*

**1011.** Educational and graduation requirements for students in foster care, ~~homeless~~ students **experiencing homelessness**, students from military families, ~~and~~ students formerly in a juvenile court school, **students who are migratory, and students participating in a newcomer program** (Education Code 48645.7, 48853, 48853.5, 49069.5, 51225.1, 51225.2)

*(ef. 6173—Education for Homeless Children)*

*(ef. 6173.1—Education for Foster Youth)*

*(ef. 6173.2—Education of Children of Military Families)*

*(ef. 6173.3—Education for Juvenile Court School Students)*

**1112.** Every Student Succeeds Act (Education Code 52059.5; 20 USC 6301 et seq.)

**1213.** Local control and accountability plan (Education Code 52075)

*(ef. 0460—Local Control and Accountability Plan)*

**1314.** Migrant education (Education Code 54440-54445)

*(ef. 6175—Migrant Education Program)*

**1415.** Physical education instructional minutes (Education Code 51210, 51222, 51223)

*(ef. 6142.7—Physical Education and Activity)*

**1516.** Student fees (Education Code 49010-49013)

*(ef. 3260—Fees and Charges)*

**1617.** Reasonable accommodations to a lactating student (Education Code 222)

**1718.** Regional occupational centers and programs (Education Code 52300-52334.7)

*(ef. 6178.2—Regional Occupational Center/Program)*

~~1819.~~ School plans for student achievement as required for the consolidated application for specified federal and/or state categorical funding (Education Code 64001)

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

~~19.~~ School safety plans (Education Code ~~32280-32289~~)

*(cf. 0450—Comprehensive Safety Plan)*

20. School site councils as required for the consolidated application for specified federal and/or state categorical funding (Education Code 65000)

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

21. State preschool programs (Education Code 8207-8225)

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

22. State preschool health and safety issues in license-exempt programs (Education Code 8212)

23. Any complaint alleging retaliation against a complainant or other participant in the complaint process or anyone who has acted to uncover or report a violation subject to this policy

24. Any other state or federal educational program the ~~Superintendent of Public Instruction~~ **SPI** or designee deems appropriate

The Board recognizes that alternative dispute resolution (ADR) can, depending on the nature of the allegations, offer a process to reach a resolution to the complaint that is acceptable to all parties. An ADR process such as mediation may be offered to resolve complaints that involve more than one student and no adult. However, mediation shall not be offered or used to resolve any complaint involving sexual assault or where there is a reasonable risk that a party to the mediation would feel compelled to participate. The Superintendent or designee shall ensure that the use of ADR is consistent with state and federal laws and regulations.

The district shall protect all complainants from retaliation. In investigating complaints, the confidentiality of the parties involved shall be protected as required by law. For any complaint alleging retaliation, or unlawful discrimination (such as discriminatory harassment, intimidation or bullying), the Superintendent or designee shall keep the identity of the complainant and/or the subject of the complaint if different from the complainant, confidential when appropriate and as long as the integrity of the complaint process is maintained.

*(cf. 4119.23/4219.23/4319.23—Unauthorized Release of Confidential/Privileged Information)*

*(cf. 5125—Student Records)*

*(cf. 9011—Disclosure of Confidential/Privileged Information)*

When an allegation that is not subject to UCP is included in a UCP complaint, the district shall refer the non-UCP allegation to the appropriate staff or agency and shall investigate and, if appropriate, resolve the UCP-related allegation(s) through the district's UCP.

The Superintendent or designee shall provide training to district staff to ensure awareness and knowledge of current law and requirements related to UCP, including the steps and timelines specified in this policy and the accompanying administrative regulation.

~~(cf. 4131—Staff Development)~~

~~(cf. 4231—Staff Development)~~

~~(cf. 4331—Staff Development)~~

The Superintendent or designee shall maintain a record of each complaint and subsequent related actions, including the steps taken during the investigation and all information required for compliance with 5 CCR 4631 and 4633.

~~(cf. 3580—District Records)~~

### **Non-UCP Complaints**

The following complaints shall not be subject to the district's UCP but shall be investigated and resolved by the specified agency or through an alternative process:

1. Any complaint alleging child abuse or neglect shall be referred to the County Department of Social Services, Protective Services Division, or the appropriate law enforcement agency. (5 CCR 4611)

~~(cf. 5141.4—Child Abuse Prevention and Reporting)~~

2. Any complaint alleging health and safety violations by a child development program shall, for licensed facilities, be referred to Department of Social Services. (5 CCR 4611)
3. Any complaint alleging that a student, while in an education program or activity in which the district exercises substantial control over the context and respondent, was subjected to sexual harassment as defined in 34 CFR 106.30 shall be addressed through the federal Title IX complaint procedures adopted pursuant to 34 CFR 106.44-106.45, as specified in **Administrative Regulation 5145.71 - Title IX Sexual Harassment Complaint Procedures**.
4. Any complaint alleging employment discrimination or harassment shall be investigated and resolved by the district in accordance with the procedures specified in **Administrative Regulation 4030 - Nondiscrimination in Employment**, including the right to file the complaint with the California **Civil Rights Department of Fair Employment and Housing**.
5. Any complaint alleging a violation of a state or federal law or regulation related to special education, a settlement agreement related to the provision of a free appropriate public education (FAPE), failure or refusal to implement a due process hearing order to which the district is subject, or a physical safety concern that interferes with the

district's provision of FAPE shall be submitted to the California Department of Education (CDE) in accordance with **Administrative Regulation** 6159.1 - Procedural Safeguards and Complaints for Special Education. (5 CCR 3200-3205)

*(cf. 6159.1—Procedural Safeguards and Complaints for Special Education)*

6. Any complaint alleging noncompliance of the district's food service program with laws regarding meal counting and claiming, reimbursable meals, eligibility of children or adults, or use of cafeteria funds and allowable expenses shall be filed with or referred to CDE in accordance with **Board Policy** 3555 - Nutrition Program Compliance. (5 CCR 15580-15584)
7. Any allegation of discrimination based on race, color, national origin, sex, age, or disability in the district's food service program shall be filed with or referred to the U.S. Department of Agriculture in accordance with **Board Policy** 3555 - Nutrition Program Compliance. (5 CCR 15582)
8. Any complaint related to sufficiency of textbooks or instructional materials, emergency or urgent facilities conditions that pose a threat to the health or safety of students teacher vacancies and misassignments shall be investigated and resolved in accordance with **Administrative Regulation** 1312.4 – Williams Uniform Complaint Procedures. (Education Code 35186)

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

*Legal Reference:*

EDUCATION CODE

~~200-262.4 Prohibition of discrimination~~

~~8200-8488 Child care and development programs~~

~~8500-8538 Adult basic education~~

~~18100-18203 School libraries~~

~~32280-32289.5 School safety plan, uniform complain procedures~~

~~35186 Williams uniform complaint procedures~~

~~46015 Parental Leave for students~~

~~48645.7 Juvenile court schools~~

~~48853-48853.5 Foster Youth~~

~~48985 Notices in language other than English~~

~~49010-49014 Student fees~~

~~49060-49079 Student records, especially:~~

~~49069.5 Records of foster youth~~

~~49490-49590 Child nutrition programs~~

~~49701 Interstate Compact on Educational Opportunity for Military Children~~

~~51210 Courses of study grades 1-6~~

~~51223 Physical education, elementary schools~~

~~51225.1-51225.2 Foster youth, homeless children, former juvenile court school students, military-connected students, migrant students, and newly arrived immigrant students; course credits; graduation requirements~~

~~51228.1-51228.3 Course periods without educational content~~

~~52059.5 Statewide system of support~~

~~52060-52077 Local control and accountability plan, especially~~

~~52075 Complaint for lack of compliance with local control and accountability plan requirements~~

~~54400-54425 Compensatory education programs~~

~~54440-54445 Migrant education~~  
~~54460-54529 Compensatory education programs~~  
~~59000-59300 Special schools and centers~~  
~~64000-64001 Consolidated application process~~  
~~65000-65001 School site councils~~  
GOVERNMENT CODE  
~~11135 Nondiscrimination in programs or activities funded by state~~  
~~12900-12996 Fair Employment and Housing Act~~  
HEALTH AND SAFETY CODE  
~~1596.792 California Child Day Care Act; general provisions and definitions~~  
~~1596.7925 California Child Day Care Act; health and safety regulations~~  
PENAL CODE  
~~422.55 Hate crime; definition~~  
~~422.6 Interference with constitutional right or privilege~~  
CODE OF REGULATIONS, TITLE 2  
~~11023 Harassment and discrimination prevention and correction~~  
CODE OF REGULATIONS, TITLE 5  
~~3200-3205 Special education compliance complaints~~  
~~4600-4670 Uniform complaint procedures~~  
~~4680-4687 Williams uniform complain procedures~~  
~~4690-4694 Complaints regarding health and safety issues in license-exempt preschool programs~~  
~~4900-4965 Nondiscrimination in elementary and secondary education programs~~  
~~15580-15584 Child nutrition programs complaint procedures~~  
UNITED STATES CODE, TITLE 20  
~~1221 Application of laws~~  
~~1232g Family Educational Rights and Privacy Act~~  
~~1681-1688 Title IX of the Education Amendments of 1972~~  
~~6301-6576 Title I Improving the academic achievement of the disadvantaged~~  
~~6801-7014 Title III language instruction for English Learners and immigrant students~~  
UNITED STATES CODE, TITLE 29  
~~794 Section 504 of Rehabilitation Act of 1973~~  
UNITED STATES CODE, TITLE 42  
~~2000d-2000e-17 Title VI and Title VII Civil Rights Act of 1964, as amended~~  
~~2000h-2-2000h-6 Title IX of the Civil Rights Act of 1964~~  
~~6101-6107 Age Discrimination Act of 1975~~  
~~11431-11435 McKinney-Vento Homeless Assistance Act~~  
~~12101-12213 Title 11 equal opportunity for individuals with disabilities~~  
CODE OF FEDERAL REGULATIONS, TITLE 28  
~~35.107 Nondiscrimination on basis of disability; complaints~~  
CODE OF FEDERAL REGULATIONS, TITLE 34  
~~99.1-99.67 Family Educational Rights and Privacy~~  
~~100.3 Prohibition of discrimination on basis of race, color or national origin~~  
~~104.7 Designation of responsible employee for Section 504~~  
~~106.1-106.82 Nondiscrimination on the basis of sex in education programs, especially:~~  
~~106.8 Designation of responsible employee and adoption of grievance procedures~~  
~~106.30 Definitions~~  
~~106.44 Response to notice of sexual harassment~~  
~~106.45 Titles IX sexual harassment complaint procedures~~  
~~110.25 Notification of nondiscrimination on the basis of age~~

*Management Resources:*

CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS

Sample UCP Board Policies and Procedures

Uniform Complaint Procedure 2021-22 Program Instrument

U.S. DEPARTMENT OF EDUCATION, OFFICE FOR CIVIL RIGHTS PUBLICATIONS

Questions and Answers on the Title IX Regulations on Sexual Harassment, July 2021

Part 1: Questions and Answers Regarding the Department's Title IX Regulations, January 2021

Dear Colleague Letter: Responding to Bullying of Students with Disabilities, October 2014

U.S. DEPARTMENT OF JUSTICE PUBLICATIONS

Guidance to Federal Financial Assistance Recipients Regarding Title VI Prohibition Against National Origin Discrimination Affecting Limited English Proficient Persons, 2007-2002

WEB SITES

- CSBA: <http://www.esba.org>  
 California Department of Education: <http://www.cde.ca.gov>  
 California Department of Fair Employment and Housing: <https://www.dfeh.ca.gov>  
 California Department of Social Services: <https://www.cdss.ca.gov>  
 Student Privacy Policy Office: <http://www2.ed.gov/about/offices/list/opepd/sppo>  
 U.S. Department of Agriculture: <https://www.usda.gov>  
 U.S. Department of Education, Office for Civil Rights: <http://www.ed.gov/oer>  
 U.S. Department of Justice: <http://www.justice.gov>  
 Student Privacy Policy Office: <https://www2.ed.gov/about/offices/list/opepd/sppo>  
 U.S. Department of Education, Office for Civil Rights: <http://www.ed.gov/oer>  
 U.S. Department of Justice: <http://www.justice.gov>

**Policy Reference Disclaimer:**

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

<u>State</u>	<u>Description</u>
2 CCR 11023	Harassment and discrimination prevention and correction
5 CCR 15580-15584	Child nutrition programs complaint procedures
5 CCR 3200-3205	Special education compliance complaints
5 CCR 4600-4670	Uniform complaint procedures
5 CCR 4600-4687	Uniform complaint procedures and Williams complaints
5 CCR 4690-4694	Complaints regarding health and safety issues in license-exempt preschool programs
5 CCR 4900-4965	Nondiscrimination in elementary and secondary educational programs receiving state or federal financial assistance
Ed. Code 18100-18203	School libraries
Ed. Code 200-262.4	Prohibition of discrimination
Ed. Code 32280-32289.5	School safety plans
Ed. Code 35186	Williams uniform complaint procedures
Ed. Code 46015	Parental leave for students
Ed. Code 48645.7	Juvenile court schools
Ed. Code 48853-48853.5	Foster youth
Ed. Code 48985	Notices to parents in language other than English
Ed. Code 49010-49013	Student fees
Ed. Code 49060-49079	Student records
Ed. Code 49069.5	Records of foster youth
Ed. Code 49490-49590	Child nutrition programs
Ed. Code 49701	Provisions of the Interstate Compact on Educational Opportunities for Military Children
Ed. Code 51204.5	Social sciences instruction; contributions of specified groups
Ed. Code 51210	Course of study for grades 1-6
Ed. Code 51222	Physical education
Ed. Code 51223	Physical education; elementary schools
Ed. Code 51225.1-51225.2	Foster youth, homeless children, former juvenile court school students; course credits; graduation requirements
Ed. Code 51226-51226.1	Career technical education
Ed. Code 51228.1-51228.3	Course periods without educational content
Ed. Code 51501	Nondiscriminatory subject matter
Ed. Code 52059.5	Statewide system of support
Ed. Code 52060-52077	Local control and accountability plan
Ed. Code 52075	Complaint for lack of compliance with local control and accountability plan requirements
Ed. Code 52300-52462	Career technical education

Ed. Code 52500-52617  
 Ed. Code 54400-54425  
 Ed. Code 54440-54445  
 Ed. Code 54460-54529  
 Ed. Code 59000-59300  
 Ed. Code 60010  
 Ed. Code 60040-60052  
 Ed. Code 64000-64001  
 Ed. Code 65000-65001  
 Ed. Code 8200-8488  
 Ed. Code 8500-8538  
 Gov. Code 11135  
 Gov. Code 12900-12996  
 H&S Code 1596.792  
 H&S Code 1596.7925  
 Pen. Code 422.55  
 Pen. Code 422.6

Federal

20 USC 1221  
 20 USC 1232g  
 20 USC 1681-1688

20 USC 6301-6576  
 20 USC 6801-7014

28 CFR 35.107  
 29 USC 794  
 34 CFR 100.3  
 34 CFR 104.7

34 CFR 106.1-106.82  
 34 CFR 106.30

34 CFR 106.44  
 34 CFR 106.45  
 34 CFR 106.8

34 CFR 110.25  
 34 CFR 99.1-99.67  
 42 USC 11431-11435  
 42 USC 12101-12213  
 42 USC 2000d-2000d-7  
 42 USC 2000h-2-2000h-6  
 42 USC 6101-6107

Management Resources

California Department of Education Publication  
 California Department of Education Publication  
 U.S. DOE, Office for Civil Rights Publication  
 U.S. DOE, Office for Civil Rights Publication  
 U.S. DOE, Office for Civil Rights Publication  
 U.S. DOJ Publication

Adult schools  
 Compensatory education programs  
 Migrant education  
 Compensatory education programs  
 Special schools and centers  
 Instructional materials; definition  
 Requirements for instructional materials  
 Consolidated application process; school plan for student achievement  
 School site councils  
 Child care and development programs  
 Adult basic education  
 Prohibition of discrimination  
 Fair Employment and Housing Act  
 California Child Day Care Act; general provisions and definitions  
 California Child Day Care Act; health and safety regulations  
 Definition of hate crime  
 Crimes; harassment

Description

Application of laws  
 Family Educational Rights and Privacy Act (FERPA) of 1974  
 Title IX of the Education Amendments of 1972; discrimination based on sex  
 Title I Improving the Academic Achievement of the Disadvantaged  
 Title III language instruction for limited English proficient and immigrant students  
 Nondiscrimination on basis of disability; complaints  
 Rehabilitation Act of 1973; Section 504  
 Prohibition of discrimination on basis of race, color or national origin  
 Section 504; Designation of responsible employee and adoption of grievances procedures  
 Nondiscrimination on the basis of sex in education programs  
 Discrimination on the basis of sex in education programs and activities; definitions  
 Recipient's response to sexual harassment  
 Grievance process for formal complaints of sexual harassment  
 Designation of coordinator; dissemination of policy, and adoption of grievance procedures  
 Notification of nondiscrimination on the basis of age  
 Family Educational Rights and Privacy  
 McKinney-Vento Homeless Assistance Act  
 Americans with Disabilities Act  
 Title VI, Civil Rights Act of 1964  
 Title IX of the Civil Rights Act of 1964  
 Age Discrimination Act of 1975

Description

Uniform Complaint Procedure 2021-22 Program Instrument  
 Sample UCP Board Policies and Procedures  
 Part 1: Questions and Answers Regarding the Department's Title IX Regulations, January 2021  
 Questions and Answers on the Title IX Regulations on Sexual Harassment, July 2021  
 Dear Colleague Letter: Responding to Bullying of Students with Disabilities, October 2014  
 Guidance to Federal Financial Assistance Recipients Regarding Title VI Prohibition Against National Origin Discrimination Affecting Limited English Proficient Persons, 2007



5141.22	<i>Infectious Diseases</i>
5141.4	<i>Child Abuse Prevention And Reporting</i>
5144	<i>Discipline</i>
5144.1	<i>Suspension And Expulsion/Due Process</i>
5145.3	<i>Nondiscrimination/Harassment</i>
5145.6	<i>Parent/Guardian Notifications</i>
5145.7	<i>Sexual Harassment</i>
5145.71	<i>Title IX Sexual Harassment Complaint Procedures</i>
5145.9	<i>Hate-Motivated Behavior</i>
5146	<i>Married/Pregnant/Parenting Students</i>
5148	<i>Child Care And Development</i>
5148.2	<i>Before/After School Programs</i>
5148.3	<i>Preschool/Early Childhood Education</i>
6142.1	<i>Sexual Health And HIV/AIDS Prevention Instruction</i>
6142.7	<i>Physical Education And Activity</i>
6145	<i>Extracurricular And Cocurricular Activities</i>
6145.2	<i>Athletic Competition</i>
6146.1	<i>High School Graduation Requirements</i>
6152	<i>Class Assignment</i>
6159	<i>Individualized Education Program</i>
6159.1	<i>Procedural Safeguards And Complaints For Special Education</i>
6159.2	<i>Nonpublic, Nonsectarian School And Agency Services For Special Education</i>
6159.3	<i>Appointment Of Surrogate Parent For Special Education Students</i>
6161.1	<i>Selection And Evaluation Of Instructional Materials</i>
6161.11	<i>Supplementary Instructional Materials</i>
6163.1	<i>Library Media Centers</i>
6164.2	<i>Guidance/Counseling Services</i>
6164.4	<i>Identification And Evaluation Of Individuals For Special Education</i>
6164.5	<i>Student Success Teams</i>
6171	<i>Title I Programs</i>
6173	<i>Education For Homeless Children</i>
6173.1	<i>Education For Foster Youth</i>
6173.2	<i>Education Of Children Of Military Families</i>
6173.3	<i>Education For Juvenile Court School Students</i>
6175	<i>Migrant Education Program</i>
6178	<i>Career Technical Education</i>
6178.1	<i>Work-Based Learning</i>
6178.2	<i>Regional Occupational Center/Program</i>
6200	<i>Adult Education</i>
9000	<i>Role Of The Board</i>
9011	<i>Disclosure Of Confidential/Privileged Information</i>
9012	<i>Board Member Electronic Communications</i>
9124	<i>Attorney</i>
9200	<i>Limits Of Board Member Authority</i>
9321	<i>Closed Session</i>
9322	<i>Agenda/Meeting Materials</i>

## UNIFORM COMPLAINT PROCEDURES

Except as may otherwise be specifically provided in other district policies, these uniform complaint procedures (UCP) shall be used to investigate and resolve only the complaints specified in the accompanying Board policy.

~~(cf. 1312.1—Complaints Concerning District Employees)~~  
~~(cf. 1312.2—Complaints Concerning Instructional Materials)~~  
~~(cf. 1312.4—Williams Uniform Complaint Procedures)~~  
~~(cf. 4030—Nondiscrimination in Employment)~~

### Compliance Officers

The district designates the individual(s), position(s), or unit(s) identified below as responsible for receiving, coordinating, and investigating complaints and for complying with state and federal civil rights laws. The individual(s), position(s), or unit(s) also serve as the compliance officer(s) specified in **Administrative Regulation 5145.3 - Nondiscrimination/Harassment** responsible for handling complaints regarding unlawful discrimination, harassment, intimidation, or bullying and in **Administrative Regulation 5145.7 - Sexual Harassment** for handling complaints regarding sexual harassment.

~~(cf. 5145.3—Nondiscrimination/Harassment)~~  
~~(cf. 5145.7—Sexual Harassment)~~  
~~(cf. 5145.71—Title IX Sexual Harassment Complaints Procedures)~~

Assistant Superintendent, Education Services  
12335 Woodside Avenue, Lakeside, CA 92040  
(619) 390-2600  
[nwinspear@lsusd.net](mailto:nwinspear@lsusd.net)

The compliance officer who receives a complaint may assign another compliance officer to investigate and resolve the complaint. The compliance officer shall promptly notify the complainant and respondent if another compliance officer is assigned to the complaint.

In no instance shall a compliance officer be assigned to a complaint in which the compliance officer has a bias or conflict of interest that would prohibit the fair investigation or resolution of the complaint. Any complaint against a compliance officer or that raises a concern about the compliance officer's ability to investigate the complaint fairly and without bias shall be filed with the Superintendent or designee who shall determine how the complaint will be investigated.

The Superintendent or designee shall ensure that employees assigned to investigate and resolve complaints receive training and are knowledgeable about the laws and programs at issue in the complaints to which they are assigned. Training provided to such employees shall include current state and federal laws and regulations governing the program; applicable processes for investigating and resolving complaints, including those alleging unlawful discrimination, harassment, intimidation, or bullying; applicable standards for reaching decisions on

complaints; and appropriate corrective measures. Assigned employees may have access to legal counsel as determined by the Superintendent or designee.

~~(cf. 4331—Staff Development)~~

~~(cf. 9124—Attorney)~~

The compliance officer or, if necessary, any appropriate administrator shall determine whether interim measures are necessary during an investigation and while the result is pending. If interim measures are determined to be necessary, the compliance officer or the administrator shall consult with the Superintendent, the Superintendent's designee, or, if appropriate, the site principal to implement one or more interim measures. The interim measures shall remain in place until the compliance officer determines that they are no longer necessary or until the district issues its final written decision, whichever occurs first.

### **Notifications**

The district's UCP policy and administrative regulation shall be posted in all district schools and offices, including staff lounges and student government meeting rooms. (Education Code 234.1)

In addition, the Superintendent or designee shall annually provide written notification of the district's UCP, to students, employees, parents/guardians of district students, the district advisory committee, school advisory committees, appropriate private school officials or representatives, and other interested parties. (5 CCR 4622)

~~(cf. 0420—School Plans/Site Councils)~~

~~(cf. 1220—Citizen Advisory Committees)~~

~~(cf. 4112.9/4212.9/4312.9—Employee Notifications)~~

~~(cf. 5145.6—Parental Notifications)~~

The notice shall include:

1. A statement that the district is primarily responsible for compliance with federal and state laws and regulations, including those related to prohibition of unlawful discrimination, harassment, intimidation, or bullying against any protected group, and a list of all programs and activities that are subject to UCP as identified in the section "Complaints Subject to UCP" in the accompanying Board policy
2. The title of the position responsible for processing complaints, the identity of the person(s) currently occupying that position if known, and a statement that such persons will be knowledgeable about the laws and programs that they are assigned to investigate
3. A statement that a UCP complaint, except a complaint alleging unlawful discrimination, harassment, intimidation, or bullying, regarding student fees must be filed no later than one year from the date the alleged violation occurred
4. A statement that a UCP complaint alleging unlawful discrimination, harassment, intimidation, or bullying must be filed no later than six months from the date of the

alleged conduct or the date the complainant first obtained knowledge of the facts of the alleged conduct

5. A statement that a student enrolled in a public school shall not be required to pay a fee for participation in an educational activity that constitutes an integral fundamental part of the district's educational program, including curricular and extracurricular activities

*(cf. 3260—Fees and Charges)*

6. A statement that a complaint regarding student fees or the local control and accountability plan (LCAP) may be filed anonymously if the complainant provides evidence or information leading to evidence to support the complaint

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

7. A statement that the district will post a standardized notice of the educational and graduation requirements ~~rights~~ of foster youth, ~~homeless~~ students **experiencing homelessness**, children of military families, and former juvenile court school students now enrolled in the district, **students who are migratory, and students participating in a newcomer program** as specified in Education Code 48645.7, 48853, 48853.5, 49069.5, 51225.1, and 51225.2, and the complaint process

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

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

*(cf. 6173.2—Education of Children of Military Families)*

*(cf. 6173.3—Education for Juvenile Court School Students)*

*(cf. 6175—Migrant Education Program)*

8. A statement that complaints will be investigated in accordance with the district's UCP and a written decision will be sent to the complainant within 60 days from the receipt of the complaint, unless this time period is extended by written agreement of the complainant
9. A statement that, for programs within the scope of the UCP as specified in the accompanying Board policy, the complainant has a right to appeal the district's investigation report to the California Department of Education (CDE) by filing a written appeal, including a copy of the original complaint and the district's decision, within 30 calendar days of receiving the district's decision
10. A statement advising the complainant of any civil law remedies, including, but not limited to, injunctions, restraining orders, or other remedies or orders that may be available under state or federal laws prohibiting discrimination laws, harassment, intimidation, or bullying, if applicable
11. A statement that copies of the district's UCP are available free of charge

The annual notification and complete contact information of the compliance officer(s), and information related to Title IX as required pursuant to Education Code 221.61 shall be posted

on the district and district school websites and, may be provided through district-supported social media, if available.

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

*(cf. 1114—District Sponsored Social Media)*

The Superintendent or designee shall ensure that all students and parents/guardians, including students and parents/guardians with limited English proficiency, have access to the relevant information provided in the district's policy, regulation, forms, and notices concerning the UCP.

If 15 percent or more of students enrolled in a particular district school speak a single primary language other than English, the district's UCP policy, regulation, forms, and notices shall be translated into that language, in accordance with Education Code 234.1 and 48985. In all other instances, the district shall ensure meaningful access to all relevant UCP information for parents/guardians with limited English proficiency.

### **Filing of Complaints**

The complaint shall also be presented to the compliance officer who shall maintain a log of complaints received, providing each with a code number and a date stamp. If a site administrator not designated as a compliance officer receives a complaint, the site administrator shall notify the compliance officer.

All complaints shall be filed in writing and signed by the complainant. If a complainant is unable to put a complaint in writing due to conditions such as a disability or illiteracy, district staff shall assist in the filing of the complaint. (5 CCR 4600)

Complaints shall be filed in accordance with the following rules, as applicable:

1. A complaint alleging district violation of applicable state or federal law or regulations governing the programs specified in the accompanying Board policy (item #1 of the section “Complaints Subject to UCP) may be filed by any individual, public agency, or organization. (5 CCR 4600)
2. Any complaint alleging noncompliance with law regarding the prohibition against student fees, deposits, and charges or any requirement related to the LCAP may be filed anonymously if the complaint provides evidence, or information leading to evidence, to support an allegation of noncompliance. A complaint about a violation of the prohibition against the charging of unlawful student fees may be filed with the principal of the school or with the Superintendent or designee.
3. A UCP complaint, except for a UCP complaint alleging unlawful discrimination, harassment, intimidation, or bullying, shall be filed no later than one year from the date the alleged violation occurred. For complaints related to the LCAP, the date of the alleged violation is the date when the County Superintendent of Schools approves the LCAP that was adopted by the Governing Board. (5 CCR 4630)

4. A complaint alleging unlawful discrimination, harassment, intimidation, or bullying, may be filed only by a person who alleges having personally suffered unlawful discrimination, a person who believes that any specific class of individuals has been subjected to unlawful discrimination, or a duly authorized representative who alleges that an individual student has been subjected to discrimination, harassment, intimidation, or bullying. (5 CCR 4630)
5. A complaint alleging unlawful discrimination, harassment, intimidation, or bullying shall be initiated no later than six months from the date that the alleged unlawful discrimination occurred, or six months from the date that the complainant first obtained knowledge of the facts of the alleged discrimination. The time for filing may be extended for up to 90 days by the Superintendent or designee for good cause upon written request by the complainant setting forth the reasons for the extension. (5 CCR 4630)
6. When a complaint alleging unlawful discrimination, harassment, intimidation, or bullying is filed anonymously, the compliance officer shall pursue an investigation or other response as appropriate, depending on the specificity and reliability of the information provided and the seriousness of the allegation.
7. When a complainant of unlawful discrimination, harassment, intimidation, or bullying or the alleged victim, when not the complainant, requests confidentiality, the compliance officer shall inform the complainant or victim that the request may limit the district's ability to investigate the conduct or take other necessary action. When honoring a request for confidentiality, the district shall nevertheless take all reasonable steps to investigate and resolve/respond to the complaint consistent with the request.

## **Mediation**

Within three business days after receiving the complaint, the compliance officer may informally discuss with all the parties the possibility of using mediation to resolve the complaint. Mediation shall be offered to resolve complaints that involve more than one student and no adult. However, mediation shall not be offered or used to resolve any complaint involving an allegation of a sexual assault or where there is a reasonable risk that a party to the mediation would feel compelled to participate. If the parties agree to mediation, the compliance officer shall make all arrangements for this process.

Before initiating the mediation of a complaint alleging retaliation, unlawful discrimination, harassment, intimidation, or bullying), the compliance officer shall ensure that all parties agree permit the mediator access to all relevant confidential information. The compliance officer shall also notify all parties of the right to end the informal process at any time.

If the mediation process does not resolve the problem within the parameters of law, the compliance officer shall proceed with an investigation of the complaint.

The use of mediation shall not extend the district's timelines for investigating and resolving the complaint unless the complainant agrees in writing to such an extension of time. If mediation

is successful and the complaint is withdrawn, then the district shall take only the actions agreed to through the mediation. If mediation is unsuccessful, the district shall then continue with subsequent steps specified in this administrative regulation.

### **Investigation of Complaint**

~~Within 10 business days after the compliance officer receives the complaint,~~ The compliance officer shall begin an investigation into the complaint **within 10 business days of receiving the complaint.**

Within one business day of initiating the investigation, the compliance officer shall provide the complainant and/or the complainant's representative with the opportunity to present the information contained in complaint to the compliance officer and shall notify the complainant and/or representative of the opportunity to present the compliance officer with any evidence, or information leading to evidence, to support the allegations in the complaint. Such evidence or information may be presented at any time during the investigation.

In conducting the investigation, the compliance officer shall collect all available documents and review all available records, notes, or statements related to the complaint, including any additional evidence or information received from the parties during the course of the investigation. The compliance officer shall individually interview all available witnesses with information pertinent to the complaint, and may visit any reasonably accessible location where the relevant actions are alleged to have taken place. At appropriate intervals, the compliance officer shall inform the parties of the status of the investigation.

To investigate a complaint alleging retaliation, unlawful discrimination, harassment, intimidation, or bullying), the compliance officer shall interview the alleged victim(s), any alleged offender(s), and other relevant witnesses privately, separately, and in a confidential manner. As necessary, additional staff or legal counsel may conduct or support the investigation.

A complainant's refusal to provide the district's investigator with documents or other evidence related to the allegations in the complaint, failure or refusal to cooperate in the investigation, or any other obstruction of the investigation may result in the dismissal of the complaint because of a lack of evidence to support the allegation.

Refusal by the district to provide the investigator with access to records and/or information related to the allegations in the complaint, failure or refusal to cooperate in the investigation, or any other obstruction of the investigation may result in a finding based on evidence collected that a violation has occurred and in the imposition of a remedy in favor of the complainant. (5 CCR 4631)

### **Timeline for Investigation Report**

Unless extended by written agreement with the complainant, the compliance officer shall prepare and send to the complainant, a written report, as described in the section "Final Written Decision" below, within 60 calendar days of the district's receipt of the complaint. (5 CCR 4631)

For any complaint alleging unlawful discrimination, harassment, intimidation, ~~and~~ **or** bullying, the respondent shall be informed of any extension of the timeline agreed to by the complainant.

### **Investigation Report**

For all complaints, the district's investigation report shall include: (5 CCR 4631)

1. The findings of fact based on the evidence gathered
2. A conclusion providing a clear determination for each allegation as to whether the district is in compliance with the relevant law
3. Corrective action(s) whenever the district finds merit in the complaint, including, when required by law, a remedy to all affected students and parents/guardians and, for a student fees complaint, a remedy that complies with Education Code 49013 and 5 CCR 4600
4. Notice of the complainant's right to appeal the district's investigation report to CDE, except when the district has used the UCP to address a complaint not specified in 5 CCR 4610
5. Procedures to be followed for initiating an appeal to CDE

The investigation report may also include follow-up procedures to prevent recurrence or retaliation and for reporting any subsequent problems.

In consultation with district legal counsel, information about the relevant part of an investigation report may be communicated to a victim who is not the complainant and to other parties who may be involved in implementing the investigation report or are affected by the complaint, as long as the privacy of the parties is protected. In a complaint alleging unlawful discrimination, harassment, intimidation, ~~and~~ **or** bullying, notice of the investigation report to the alleged victim shall include information about any sanction to be imposed upon the respondent that relates directly to the alleged victim.

If the complaint involves a limited-English-proficient (LEP) student or parent/guardian, then the district's response, if requested by the complainant, and the investigation report shall be written in English and the primary language in which the complaint was filed.

For complaints alleging unlawful discrimination, harassment, intimidation, and bullying, based on state law the investigation report shall also include a notice to the complainant that:

1. The complainant may pursue available civil law remedies outside of the district's complaint procedures, including, but not limited to, injunctions, restraining orders or other remedies or orders, 60 calendar days after the filing of an appeal with CDE. (Education Code 262.3)
2. The 60 days moratorium does not apply to complaints seeking injunctive relief in state

courts or to discrimination complaints based on federal law. (Education Code 262.3)

3. Complaints alleging discrimination based on race, color, national origin, sex, gender, disability, or age may also be filed with the U.S. Department of Education, Office for Civil Rights at [www.ed.gov/ocr](http://www.ed.gov/ocr) within 180 days of the alleged discrimination.

### **Corrective Actions**

When a complaint is found to have merit, the compliance officer shall adopt any appropriate corrective action permitted by law. Appropriate corrective actions that focus on the larger school or district environment may include, but are not limited to, actions to reinforce district policies, training for faculty, staff, and students, updates to school policies, or school climate surveys.

*(cf. 5137—Positive School Climate)*

For complaints involving retaliation or unlawful discrimination, harassment, intimidation, or bullying), appropriate remedies that may be offered to the victim but not communicated to the respondent may include, but are not limited to, the following:

1. Counseling

*(cf. 6164.2—Guidance/Counseling Services)*

2. Academic support
3. Health services
4. Assignment of an escort to allow the victim to move safely about campus
5. Information regarding available resources and how to report similar incidents or retaliation
6. Separation of the victim from any other individuals involved, provided the separation does not penalize the victim
7. Restorative justice
8. Follow-up inquiries to ensure that the conduct has stopped and there has been no retaliation

For complaints of retaliation, unlawful discrimination, harassment, intimidation, or bullying) involving a student as the respondent, appropriate corrective actions that may be provided to the student include, but are not limited to, the following:

1. Transfer from a class or school as permitted by law
2. Parent/guardian conference

3. Education regarding the impact of the conduct on others
4. Positive behavior support
5. Referral to a student success team

*(cf. 6164.5—Student Success Teams)*

6. Denial of participation in extracurricular or co-curricular activities or other privileges as permitted by law

*(cf. 6145—Extracurricular and Coextracurricular Activities)*

7. Disciplinary action, such as suspension or expulsion, as permitted by law

*(cf. 5144—Discipline)*

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

When an employee is found to have committed retaliation or unlawful discrimination, harassment, intimidation, or bullying), the district shall take appropriate disciplinary action, up to and including dismissal, in accordance with applicable law and collective bargaining agreement.

*(cf. 4118—Dismissal/Suspension/Disciplinary Action)*

*(cf. 4218—Dismissal/Suspension/Disciplinary Action)*

The district may also consider training and other interventions for the larger school community to ensure that students, staff, and parents/guardians understand the types of behavior that constitute unlawful discrimination, harassment, intimidation, or bullying), that the district does not tolerate it, and how to report and respond to it.

When a complaint is found to have merit, an appropriate remedy shall be provided to the complainant or other affected person.

However, if a complaint alleging noncompliance with the laws regarding student fees, deposits, and other charges, physical education instructional minutes, courses without educational content, or any requirement related to the LCAP is found to have merit, the district shall provide a remedy to all affected students and parents/guardians subject to procedures established by regulation of the State Board of Education. (Education Code 49013, 51222, 51223, 51228.3, 52075)

For complaints alleging noncompliance with the laws regarding student fees, the district, by engaging in reasonable efforts, shall attempt in good faith to identify and fully reimburse all affected students and parents/guardians who paid the unlawful student fees within one year prior to the filing of the complaint. (Education Code 49013; 5 CCR 4600)

### **Appeals to the California Department of Education**

Any complainant who is dissatisfied with the district's investigation report on a complaint regarding any specified federal or state educational program subject to UCP may file an appeal

in writing with the CDE within 30 calendar days of receiving the district's investigation report. (5 CCR 4632)

The appeal shall be sent to CDE with a copy of the original locally filed complaint and a copy of the district's investigation report for that complaint. The complainant shall specify and explain the basis for the appeal, including at least one of the following. (5 CCR 4632)

1. The district failed to follow its complaint procedures.
2. Relative to the allegations of the complaint, the district's investigation report lacks material findings of fact necessary to reach a conclusion of law.
3. The material findings of fact in the district's investigation report are not supported by substantial evidence.
4. The legal conclusion in the district's investigation report is inconsistent with the law.
5. In a case in which the district found noncompliance, the corrective actions fail to provide a proper remedy.

Upon notification by CDE that the district's investigation report has been appealed, the Superintendent or designee shall forward the following documents to the CDE within 10 days of the date of notification: (5 CCR 4633)

1. A copy of the original complaint
2. A copy of the district's investigation report
3. A copy of the investigation file including, but not limited to, all notes, interviews, and documents submitted by the parties and gathered by the investigator
4. A report of any action taken to resolve the complaint
5. A copy of the district's UCP
6. Other relevant information requested by the CDE

If notified by CDE that the district's investigation report failed to address allegation(s) raised by the complaint, the district shall, within 20 days of the notification, provide CDE and the appellant with an amended investigation report that addresses the allegation(s) that were not addressed in the original investigation report. The amended report shall also inform the appellant of the right to separately appeal the amended report with respect to the allegation(s) that were not addressed in the original report. (5 CCR 4632)

### **Health and Safety Complaints in California State Preschool Program**

Any complaint regarding health or safety issues in a license-exempt California State Preschool Program (CSPP) shall be addressed through the procedures described in 5 CCR 4690-4694.

In order to identify appropriate subjects of CSPP health and safety issues pursuant to Health and Safety Code 1596.7925, a notice shall be posted in each license-exempt CSPP classroom in the district notifying parents/guardians, students, and teachers of the health and safety requirements of Title 5 regulations that apply to CSPP programs pursuant to Health and Safety Code 1596.7925 and the location at which to obtain a form to file any complaint alleging noncompliance with those requirements. For this purpose, the Superintendent or designee may download and post a notice available from the CDE website. (Education Code 8212; 5 CCR 4691)

The district's annual UCP notification distributed pursuant to 5 CCR 4622 shall clearly indicate which of its CSPP programs are operating as exempt from licensing and which CSPP programs are operating pursuant to requirements under Title 22 of the Code of Regulations. (5 CCR 4691)

Any complaint regarding specified health or safety issues in a license-exempt CSPP program shall be filed with the preschool program administrator or designee, and may be filed anonymously. The complaint form shall specify the location for filing the complaint, contain a space to indicate whether the complainant desires a response to the complaint, and allow a complainant to add as much text as desired to explain the complaint. (Education Code 8212; 5 CCR 4690)

If it is determined that the complaint is beyond the authority of the preschool program administrator, the matter shall be forwarded to the Superintendent or designee in a timely manner, not to exceed 10 working days, for resolution. The preschool administrator or the Superintendent or designee shall make all reasonable efforts to investigate any complaint within their authority. (Education Code 8212; 5 CCR 4692)

Investigation of a complaint regarding health or safety issues in a license-exempt CSPP program shall begin within 10 days of receipt of the complaint. (Education Code 8212; 5 CCR 4692)

The preschool administrator or designee shall remedy a valid complaint within a reasonable time period not to exceed 30 working days from the date the complaint was received. If the complainant has indicated on the complaint form a desire to receive a response to the complaint, the preschool administrator or Superintendent's designee shall, within 45 working days of the initial filing of the complaint, report the resolution of the complaint to the complainant and CDE's assigned field consultant. If the preschool administrator makes this report, the information shall be reported at the same time to the Superintendent or designee. (Education Code 8212; 5 CCR 4692)

If a complaint regarding health or safety issues in a license-exempt CSPP program involves an LEP student or parent/guardian, then the district's response, if requested by the complainant, and the investigation report shall be written in English and the primary language in which the complaint was filed.

If a complainant is not satisfied with the resolution of a complaint, the complainant has the right to describe the complaint to the Board at a regularly scheduled hearing and, within 30

days of the date of the written report, may file a written appeal of the district's decision to the Superintendent of Public Instruction in accordance with 5 CCR 4632. (Education Code 8212; 5 CCR 4693, 4694)

All complaints and responses are public records. (5 CCR 4690)

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

On a quarterly basis, the Superintendent or designee shall report summarized data on the nature and resolution of all CSPP health and safety complaints, including the number of complaints by general subject area with the number of resolved and unresolved complaints, to the Board at a regularly scheduled Board meeting and to the County Superintendent. (5 CCR 4693)

# LAKESIDE UNION SCHOOL DISTRICT

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**Governing Board Meeting Date:** 4/11/24

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**Agenda Item:**

Board Policy and Administrative Regulation 3311: Bids

**Background (Describe purpose/rationale of the agenda item):**

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

**Fiscal Impact (Cost):**

N/A

**Funding Source:**

N/A

**Recommended Action:**

- |                                                       |                                                                                        |
|-------------------------------------------------------|----------------------------------------------------------------------------------------|
| <input type="checkbox"/> <b>Informational</b>         | <input type="checkbox"/> <b>Denial</b>                                                 |
| <input checked="" type="checkbox"/> <b>Discussion</b> | <input type="checkbox"/> <b>Ratification</b>                                           |
| <input type="checkbox"/> <b>Approval</b>              | <input type="checkbox"/> <b>Explanation:</b> <a href="#">Click here to enter text.</a> |
| <input type="checkbox"/> <b>Adoption</b>              |                                                                                        |

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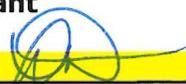
**Originating Department/School:** Superintendent's Office

**Submitted/Recommended By:**

  
\_\_\_\_\_  
**Lisa DeRosier, Executive Assistant**

**Approved for Submission to the Governing Board:**

  
\_\_\_\_\_  
**Dr. Rhonda Taylor, Superintendent**

**Reviewed by Cabinet Member:** 

**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. (Public Contract Code 20116)

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 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, 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)

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 any personal property to the extent authorized by law. (Public Contract Code 20118)

*Legal Reference:*

EDUCATION CODE

~~17070.10-17079.30 Leroy F. Green School Facilities Act~~  
~~177250.10-17250.55 Design-Build Contracts~~  
~~17406 Lease-Leaseback Contracts~~  
~~17595 Purchases 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 CODE

~~7056 General engineering contractor~~  
~~7057 General building contractor~~

CODE OF CIVIL PROCEDURE

~~446 Verification of pleadings~~

GOVERNMENT CODE

~~4217.10-4217.18 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 CODE

~~1102 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~~  
~~20110-20118.4 Local Agency Public Construction Act; school districts~~  
~~20189 Bidder's security, earthquake relief~~  
~~22000-22045 Alternative procedures for public projects (UPCCAA)~~  
~~22152 Recycled product procurement~~

COURT DECISIONS

~~*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 USD*, (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:*

WEB SITES

~~CSBA: <http://www.esba.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>~~

**Policy Reference Disclaimer:**

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

State

Bus. Code 7056  
Bus. Code 7057  
Code of Civil Procedure 446  
Ed. Code 17070.10-17079.30  
Ed. Code 17250.10-17250.55  
Ed. Code 17250.60-17250.69  
Ed. Code 17406  
Ed. Code 17595  
Ed. Code 17602  
Ed. Code 38083  
Ed. Code 38110-38120  
Ed. Code 39802  
Gov. Code 4217.10-4217.18  
Gov. Code 4330-4334  
Gov. Code 53060  
Gov. Code 54201-54205  
Gov. Code 7920.530  
Pub. Cont. Code 1102  
Pub. Cont. Code 1103  
Pub. Cont. Code 12200  
Pub. Cont. Code 2000-2002  
Pub. Cont. Code 20101-20103.7  
Pub. Cont. Code 20103.8  
Pub. Cont. Code 20110-20118.4  
Pub. Cont. Code 20189  
Pub. Cont. Code 22000-22045  
Pub. Cont. Code 22152  
Pub. Cont. Code 3000-3010  
Pub. Cont. Code 3400  
Pub. Cont. Code 3410  
Pub. Cont. Code 4113  
Pub. Cont. Code 6102  
Pub. Cont. Code 6610

Management Resources

Attorney General Opinion  
CA Department of General Services Publication  
CA Department of General Services Publication  
CA Department of Industrial Relations Publication  
Court Decision  
Court Decision  
Court Decision  
Court Decision  
Court Decision  
Website  
Website  
Website  
Website  
Website

Description

General engineering contractor  
General building contractor  
Verification of pleadings  
Leroy F. Greene School Facilities Act  
Design-build contracts  
Alternative design-build contracts  
Lease-leaseback contract  
Purchase of supplies through Department of General Services  
Purchase of surplus property from federal agencies  
Purchase of perishable foodstuffs and seasonal commodities  
Apparatus and supplies  
Transportation services  
Energy conservation contracts  
California made materials  
Special services and advice  
Purchase of supplies and equipment by local agencies  
Definition of public record  
Definition of emergency  
Definition; responsible bidder  
Definitions, recycled goods, materials and supplies  
Responsive bidders  
Public construction projects; requirements for bidding  
Award of contracts  
Local Agency Public Construction Act; school districts  
Bidder's security; earthquake relief  
Uniform Public Construction Cost Accounting Act  
Recycled product procurement  
Roofing projects  
Bid specifications  
U.S. produce and processed foods  
Prime contractor; subcontractor  
Bribery of public official; voidable contract  
Bid visits

Description

89 Ops.Cal.Atty.Gen. 1 (2006)  
Office of Public School Construction, Piggyback Contracts  
Office of Public School Construction Notification to School Districts  
Regarding Use of Piggyback Contracts for SAB-Administered Programs,  
July 2022  
Model Prequalification Questionnaire  
City of Inglewood-Los Angeles County Civic Center Authority v.  
Superior Court, (1972) 7 Cal.3d 861  
Great West Contractors Inc. v. Irvine Unified School District, (2010) 187  
Cal.App.4th 1425  
Konica Business Machines v. Regents of the University of California,  
(1988) 206 Cal.App.3d 449  
Los Angeles Unified School District v. Great American Insurance Co.,  
(2010) 49 Cal.4th 739  
Marshall v. Pasadena Unified School District, (2004) 119 Cal.App.4th  
1241  
CSBA District and County Office of Education Legal Services  
California Department of General Services  
CSBA  
California Department of Education  
California Association of School Business Officials

*Cross References*

<u>Code</u>	<u>Description</u>
0410	<i>Nondiscrimination In District Programs And Activities</i>
1113	<i>District And School Websites</i>
1340	<i>Access To District Records</i>
3000	<i>Concepts And Roles</i>
3230	<i>Federal Grant Funds</i>
3270	<i>Sale And Disposal Of Books, Equipment And Supplies</i>
3300	<i>Expenditures And Purchases</i>
3311.1	<i>Uniform Public Construction Cost Accounting Procedures</i>
3311.2	<i>Lease-Leaseback Contracts</i>
3311.3	<i>Design-Build Contracts</i>
3311.4	<i>Procurement Of Technological Equipment</i>
3312	<i>Contracts</i>
3314	<i>Payment For Goods And Services</i>
3510	<i>Green School Operations</i>
3511	<i>Energy And Water Management</i>
3511.1	<i>Integrated Waste Management</i>
3512	<i>Equipment</i>
3517	<i>Facilities Inspection</i>
3540	<i>Transportation</i>
3551	<i>Food Service Operations/Cafeteria Fund</i>
3580	<i>District Records</i>
3600	<i>Consultants</i>
6161.1	<i>Selection And Evaluation Of Instructional Materials</i>
6161.11	<i>Supplementary Instructional Materials</i>
6163.1	<i>Library Media Centers</i>
7000	<i>Concepts And Roles</i>
7140	<i>Architectural And Engineering Services</i>
9270	<i>Conflict Of Interest</i>
9320	<i>Meetings And Notices</i>
9323.2	<i>Actions By The Board</i>

**BIDS**

**Advertised/Competitive Bids**

The district has adopted the California Uniform Public Construction Cost procedures under **shall advertise for any of the following:** (Public Contract Code 22000 et. Seq. 20111)

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

1. **A public contract that involves an expenditure projects of \$45,000 15,000 or less 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 may be performed by district employees by force account, negotiated contract, or purchase order. (Public Contract Code 22032)**
2. **A contracts for public projects of \$175,000 or less may be awarded through the following informal procedures: (Public Contract Code 22032, 22034, 22038) that exceeds the amount specified in law, as annually adjusted by the Superintendent of Public Instruction, for any of the following:**
  - a. **The Superintendent or designee shall maintain a list of qualified contractors, identified according to categories of work. The purchase of equipment, materials, or supplies to be furnished, sold, or leased to the district**
  - 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. Services, not including construction services or special services and advice in accounting, financial, legal, or administrative matters**
  - c. **The district shall review the informal bids and award the contract, except that: 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)**

- ~~(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.~~
    - ~~(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)~~

### **Instructions and Procedures for Advertised Bids**

The Superintendent or designee shall call for bids by placing a notice at least once a week for two weeks in a local newspaper of general circulation published in the district, or if no such newspaper exists, then in some newspaper of general circulation that is circulated in the county. The Superintendent or designee also may post the notice on the district's website or through an electronic portal. The notice shall state the work to be done or materials or supplies to be furnished and the time and place and website where bids will be opened. (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. **For lease-leaseback, design-build, and alternative design-build projects, the notice shall specify that the project is subject to skilled and trained workforce requirements.** (Education Code 17250.25, 17250.62, 17407.5; Public Contract Code 2600, 6610)

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

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

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

3. When a standardized proposal form is provided by the district, bids not presented on the standard form shall be disregarded. (Public Contract Code 20111.5)
4. Bids shall not be accepted after the advertised bid opening time, regardless of whether the bids are actually opened at that time. (Public Contract Code 20112)

5. When two or more identical lowest or highest bids are received, the Governing Board may determine by lot which bid shall be accepted. (Public Contract Code 20117)
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 responsible bidders who have demonstrated trustworthiness, quality, fitness, capacity, and experience to satisfactorily perform the public works contract.
  - a. When a bid is determined to be nonresponsive, the Superintendent or designee shall notify the bidder and give ~~him/her~~ **the bidder** an opportunity to respond to the determination.
  - b. When the lowest bidder is determined to be nonresponsive, the Superintendent or designee shall notify the bidder of ~~his/her~~ **the** right to present evidence of ~~his/her~~ **the bidder's** responsibility at a hearing before the board.
8. After being opened, all submitted bids become public records pursuant to Government Code 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)~~

## **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 prequalification questionnaire and financial record which, when completed, shall indicate a bidder's statement of financial ability and experience in performing public works. The bidder's information shall be verified under oath in the manner in which civil law pleadings are verified. The questionnaires and financial statements shall not be public records and shall not be open to public inspection. (Code of Civil Procedure 446; Public Contract Code 20111.5, 20111.6)

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

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

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

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

## **Award of Contract**

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

1. When the contract is for the procurement and/or maintenance of electronic data processing systems and supporting software, in which case the Board may contract with any one of the three lowest responsible bidders (Public Contract Code 20118.1)
2. When the contract is for any transportation service which involves an expenditure of more than \$10,000 and which will be made with any person or corporation other than a common carrier, municipally owned transit system, or a parent/guardian of 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. 311.2—Lease-Leaseback Contracts)*

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

*(cf. 3311.3—Design-Build Contracts)*

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

## **Protests by Bidders**

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

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

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~~**

~~Rather than seek competitive bids, the Board 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 construction or for the procurement of any product that is available in substantial quantities to the general public. (Public Contract Code 20118.2)~~

~~The competitive negotiation process shall include, but not be limited to, the following requirements: (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 Board shall award the contract to the qualified bidder whose proposal meets the evaluation standards and will be most advantageous to the district with price and all other factors considered.~~
- ~~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 and request new RFPs.~~

- ~~9. 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.~~

### **Protests by Bidders**

**If the bidder believes that the award is not in compliance with law, Board policy, or the bid specification, the bidder may protest the award. A protest must be filed in writing with the Superintendent or designee within five working days after receipt of notification of the contract award and shall include all documents supporting or justifying the protest. A bidder's failure to file the protested documents in a timely manner shall constitute a waiver of the right to protest the award of the contract.**

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

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

### **Limitation on Use of Sole Sourcing**

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, (**also known as 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

*(cf. 9323.2—Actions by the Board)*

### **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~~ **“piggyback” by authorizing** another public corporation or agency, by contract, lease, requisition, or purchase order, to lease data-processing equipment or to purchase materials, supplies, equipment, automotive vehicles, tractors, and other personal property for the district in the manner that the other public corporation or agency is authorized to make the leases or purchases from a vendor (~~“piggyback”~~). Alternatively, if the public corporation or agency has an existing contract with a vendor for the lease or purchase of personal property, the district may authorize the lease or purchase of personal property directly from the vendor and make payments under the same terms that are available to the public corporation or agency under the contract. (Public Contract Code 20118)

*(cf. 3300—Expenditures and Purchases)*

*(cf. 3512—Equipment)*

In addition, upon a determination that it is in the best interest of the district and without advertising for bids, the Board 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”). 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 17406, 17407.5)

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

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

**weeks in advance and shall be based on a cost and saving comparison finding specified in Government Code 4217.12. (Government Code 4217.12)**

Any lease-leaseback agreement shall include a lease term that specifies the district's use and occupancy of the building or improved property during the term of the lease and a financing component as may be determined on a case-by-case basis.

Regardless of the funding source, when any lease-leaseback agreement is for a public project, involves an expenditure of \$1,000,000 or more, and meets other criteria in Public Contract Code 20111.6, the prequalification requirements specified in the "Prequalification Procedure" section above shall be followed. (Education Code 17406)

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~~ **saving** comparison ~~findings~~ **finding** 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)

~~(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)

Regulation  
approved: September 17, 2012  
revised: ~~December 10, 2015~~; September 14, 2017

LAKESIDE UNION SCHOOL DISTRICT  
Lakeside, California

# LAKESIDE UNION SCHOOL DISTRICT

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**Governing Board Meeting Date:** 4/11/24

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**Agenda Item:**

Board Policy and Administrative Regulation 3400: Management District Assets/Accounts

**Background (Describe purpose/rationale of the agenda item):**

First Reading: Policy updated to reflect NEW LAW (SB 1439, 2022) related to conflict of interest from campaign contributions and existing conflict of interest provisions by providing that Governing Board members and district employees involved in the making of contracts on behalf of the district comply with the district's conflict of interest policy as specified in Board Bylaw 9270 - Conflict of Interest. Policy also updated to direct the Superintendent to submit reports of the district's financial status to the Board, in accordance with Board Policy and Administrative Regulation 3460 - Financial Reports and Accountability, and develop additional internal controls to strengthen fraud prevention. Administrative Regulation 3400 - Management of District Assets/Accounts Regulation updated to reference Governmental Accounting Standards Board's (GASB) Statement #87 regarding lease accounting and GASB Statement #96 regarding subscription-based information technology agreements. Regulation also updated to clarify that the district should utilize the California Department of Education's standardized account code structure software to develop financial reports, and that the district's accounting system should comply with generally accepted accounting principles prescribed by GASB and meet other state and federal reporting guidelines. Additionally, regulation updated to expand the list of actions that constitute fraud, financial improprieties or irregularities; separate out district and county office of education investigations; clarify that the district cooperate with the County Superintendent of Schools, Fiscal Crisis and Management Assistance Team, law enforcement, or other governmental entities that conduct a fraud investigation; and, consult legal when discussing or disclosing the result of any fraud investigation.

**Fiscal Impact (Cost):**

N/A

**Funding Source:**

N/A

**Recommended Action:**

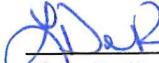
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| <input checked="" type="checkbox"/> <b>Discussion</b> | <input type="checkbox"/> <b>Ratification</b>                                           |
| <input type="checkbox"/> <b>Approval</b>              | <input type="checkbox"/> <b>Explanation:</b> <a href="#">Click here to enter text.</a> |
| <input type="checkbox"/> <b>Adoption</b>              |                                                                                        |
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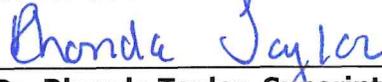
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**Originating Department/School:** Superintendent's Office

**Submitted/Recommended By:**

**Approved for Submission to the Governing Board:**

  
\_\_\_\_\_  
**Lisa DeRosier, Executive Assistant**

  
\_\_\_\_\_  
**Dr. Rhonda Taylor, Superintendent**

**Reviewed by Cabinet Member:**

  
\_\_\_\_\_

**MANAGEMENT OF DISTRICT ASSETS/ACCOUNTS**

The Governing Board recognizes its fiduciary responsibility to effectively manage and safeguard the district's assets and resources in order to help achieve the district's goals for student learning. The Superintendent or designee shall establish and maintain an accurate, efficient financial management system that enhances the district's ability to meet its fiscal obligations, produces reliable financial reports, and complies with laws, regulations, policies, and procedures. ~~He/she~~ **The Superintendent or designee** shall ensure that the district's accounting system provides ongoing internal controls and meets generally accepted accounting standards **as specified by the California Department of Education and, as appropriate, the Governmental Accounting Standards Board (GASB). When required by law or as directed by the Board, and in accordance with Board Policy and Administrative Regulation 3460 - Financial Reports and Accountability, the Superintendent or designee shall submit to the Board reports of the district's financial status.**

- (cf. 3000 – Concepts and Roles)*
- (cf. 3100 – Budget)*
- (cf. 3300 – Expenditures and Purchases)*
- (cf. 3312 – Contracts)*
- (cf. 3314 – Payment for Goods and Services)*
- (cf. 3460 – Financial Reports and Accountability)*

**Capital Assets**

The Superintendent or designee shall develop a system to accurately identify and value district assets in order to help ensure financial accountability and to minimize the risk of loss or misuse. District assets with a useful life of more than one year and an initial acquisition cost of \$5,000 or more shall be considered capital assets. The Superintendent or designee shall determine the estimated useful life of each capital asset and shall calculate and report the estimated loss of value or depreciation during each accounting period for all capital assets.

- (cf. 3440 – Inventories)*

**Internal Controls/Fraud Prevention**

The Board expects Board members, employees, consultants, vendors, contractors, and other parties maintaining a business relationship with the district to act with integrity and due diligence in dealings involving the district's assets and fiscal resources.

**Board members and district employees involved in the making of contracts on behalf of the district shall comply with the district's conflict of interest policy as specified in Board Bylaw 9270 – Conflict of Interest.**

The Superintendent or designee shall develop internal controls which aid in the prevention and detection of fraud, financial impropriety, or irregularity within the district-, **assist with effective and efficient operation of the district, produce reliable financial information, and ensure compliance with all applicable laws and regulations.** These internal controls may include, but are not limited to, segregating **and monitoring** employee duties relating to

authorization, custody of assets, and recording or reporting of transactions; providing detailed, written job descriptions explaining the segregation of functions; adopting an integrated financial system; **developing timely reconciliations of budgets, ledgers, and accounts**; conducting background checks on business office employees; and requiring continuous in-service training for business office staff **and board members** on the importance of fraud prevention, **financial management, budget, and governance**.

All employees shall be alert for any indication of fraud, financial impropriety, or irregularity within their area of responsibility. Any employee who suspects fraud, impropriety, or irregularity shall immediately report those suspicions to ~~his/her~~ **the employee's** immediate supervisor and/or the Superintendent or designee. In addition, the Superintendent or designee shall establish a method for employees and outside persons to anonymously report any suspected instances of fraud, impropriety, or irregularity.

*(ref. 4119.1/4219.1/4319.1 – Civil and Legal Rights)*

The Superintendent or designee shall have primary responsibility for any necessary investigations of suspected fraud, impropriety, or irregularity, in coordination with legal counsel, the district's auditors, **the Fiscal Crisis and Management Assistance Team (FCMAT)**, law enforcement agencies, or other governmental entities, as appropriate.

The Superintendent or designee shall provide regular reports to the Board on the status of the district's internal control procedures and recommend any necessary revisions to related Board policies or administrative regulations.

*Legal Reference:*

EDUCATION CODE

~~14500-14508 – Financial and compliance audits~~

~~35035 – Powers and duties of superintendent~~

~~35250 – Duty to keep certain records and reports~~

~~41010-41023 – Accounting regulations, budget controls and audits~~

~~42600-42604 – Control of expenditures~~

~~42647 – Drawing of warrants by district on county treasurer; form; reports, statements and other data~~

GOVERNMENT CODE

~~53995-53997 – Obligation of contract~~

*Management Resources:*

CSBA PUBLICATIONS

~~Maximizing School Board Governance: Budget Planning and Adoption, 2006~~

~~Maximizing School Board Governance: Fiscal Accountability, 2006~~

~~School Finance CD-ROM, 2005~~

GOVERNMENTAL ACCOUNTING STANDARDS BOARD

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

WEB SITES

~~CSBA: <http://www.esba.org>~~

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

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

~~California State Controller's Office: <http://www.seo.ca.gov>~~

~~Fiscal Crisis & Management Assistance Team: <http://www.femat.org>~~

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

~~School Services of California: <http://www.sseal.com>~~

**Policy Reference Disclaimer:**

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

State

Ed. Code 1241.5  
Ed. Code 14500-14508  
Ed. Code 35035  
Ed. Code 35250  
Ed. Code 41010-41023  
Ed. Code 42600-42603  
Ed. Code 42647

Description

Audit by county superintendent  
Financial and compliance audits  
Powers and duties of the superintendent; transfer authority  
Duty to keep certain records and reports  
Accounting regulations; budget controls and audits  
Control of expenditures  
Drawing of warrants by district on county treasurer; form; reports, statements, and other data  
Prohibitions applicable to specified officers  
Obligation of contract  
Campaign Disclosure  
Political Reform Act

Elec. Code 1090-1099  
Gov. Code 53995-53997  
Gov. Code 84308  
Gov. Code 87100-87500

Management Resources

Description

Governmental Accounting Standards Pub.	Board Implementation Guide No. 2019-3, Leases, August 2019
Governmental Accounting Standards Pub.	Board Implementation Guide No. 2023-1, Implementation Guidance Update – 2023, June 2023
Governmental Accounting Standards Statement	Board Statement 96, Subscription-Based Information Technology Arrangements, May 2020
Governmental Accounting Standards Statement	Board Statement 87, Leases, June 2017
Governmental Accounting Standards Website	Board Statement 34, Basic Financial Statements and Management's Discussion and Analysis - For State and Local Governments, June 1999
Website	CSBA District and County Office of Education Legal Services
Website	Governmental Accounting Standards Board
Website	California Department of Education, Finance and Grants
Website	California State Controller
Website	CSBA
Website	Fiscal Crisis and Management Assistance Team
Website	California Association of School Business Officials
Website	School Services of California, Inc.

Cross References

Code

3000  
3100  
3230  
3300  
3312  
3314  
3314.2  
3430  
3440  
3451  
3452  
3460  
3470  
3511  
3530  
3551  
4112.6  
4119.1

Description

Concepts And Roles  
Budget  
Federal Grant Funds  
Expenditures And Purchases  
Contracts  
Payment For Goods And Services  
Revolving Funds  
Investing  
Inventories  
Petty Cash Funds  
Student Activity Funds  
Financial Reports And Accountability  
Debt Issuance And Management  
Energy And Water Management  
Risk Management/Insurance  
Food Service Operations/Cafeteria Fund  
Personnel Files  
Civil And Legal Rights

4119.23	<i>Unauthorized Release Of Confidential/Privileged Information</i>
4151	<i>Employee Compensation</i>
4212.6	<i>Personnel Files</i>
4219.1	<i>Civil And Legal Rights</i>
4219.23	<i>Unauthorized Release Of Confidential/Privileged Information</i>
4251	<i>Employee Compensation</i>
4312.6	<i>Personnel Files</i>
4319.1	<i>Civil And Legal Rights</i>
4319.23	<i>Unauthorized Release Of Confidential/Privileged Information</i>
4351	<i>Employee Compensation</i>
5126	<i>Awards For Achievement</i>
9124	<i>Attorney</i>
9270	<i>Conflict Of Interest</i>

**Business and Noninstructional Operations**

AR 3400(a)

**MANAGEMENT OF DISTRICT ASSETS/ACCOUNTS**

**Accounts**

The district's accounting system shall fully comply with the definitions, instructions and procedures set forth in the California Department of Education (CDE) School Accounting Manual. (Education Code 41010)

**The district shall utilize CDE's standardized account code structure (SACS) software to develop financial reports. The district's accounting system shall comply with generally accepted accounting principles prescribed by the Governmental Accounting Standards Board (GASB) and meet other state and federal reporting guidelines.**

The Superintendent or designee shall ensure that funds are encumbered in the district accounting records immediately after an expenditure is committed for subsequent payment.

*(cf. 3110—Transfer of Funds)*

**Fraud ~~Prevention and Investigation~~ and Misappropriation of Funds**

Fraud, financial improprieties or irregularities include but are not limited to:

1. Forgery or unauthorized alteration of any document or account belonging to the district
2. Forgery or unauthorized alteration of a check, bank draft, or any other financial document
3. Misappropriation of funds, securities, supplies or other assets
4. Impropriety in the handling of money or reporting of financial transactions
5. Profiteering as a result of insider knowledge of district information or activities
6. Disclosing confidential and/or proprietary information to outside parties

*1. (cf. 4119.23/4219.23/4319.23—Unauthorized Release of Confidential/Privileged Information)*

7. Disclosing investment activities engaged in or contemplated by the district

*2. (cf. 3430—Investing)*

8. Accepting or seeking anything of material value from contractors, vendors or persons providing services or materials to the district
9. Destroying, removing or inappropriately using of records, furniture, fixtures or equipment

10. Failing to provide financial records to authorized state or local entities

**11. Overstating income, expenses, or misreporting time**

**12. Failing to report a conflict of interest**

13. Any other dishonest or fraudulent act

### **District Investigation**

The Superintendent or designee shall investigate reports of fraudulent activity in a manner that protects the confidentiality of the parties and the facts. All employees involved in the investigation shall be advised to keep information about the investigation confidential.

If an investigation substantiates the occurrence of a fraudulent activity, the Superintendent or designee shall issue a report to appropriate personnel and to the Governing Board. The final disposition of the matter and any decision to file a criminal complaint or refer the matter to the appropriate law enforcement and/or regulatory agency for independent investigation ~~shall, and discussing or disclosing the result of any investigation shall~~ be made in consultation with legal counsel. ~~The result of the investigation shall not be disclosed to or discussed with anyone other than those individuals with a legitimate need to know.~~

*(ef. 4112.6/4212.6/4312.6 – Personnel Files)*

*(ef. 4119.1/4219.1/4319.1 – Civil and Legal Rights)*

### **County Office of Education Investigation**

**The district shall cooperate with the County Superintendent of Schools, Fiscal Crisis and Management Assistance Team (FCMAT), law enforcement, or other governmental entities that conduct a fraud investigation, in accordance with law. (Education Code 1241.5)**

# LAKESIDE UNION SCHOOL DISTRICT

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**Governing Board Meeting Date:** 4/11/24

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**Agenda Item:**

Board Policy and Administrative Regulation 4112.2: Certification

**Background (Describe purpose/rationale of the agenda item):**

First Reading: Policy updated to reference that the Commission on Teacher Credentialing (CTC) has adopted regulations to implement statutory changes to the subject matter competence requirements, add, to the first philosophical paragraph, demonstration of competency in the subject matter to be taught to the attributes of certificated staff, provide that the Governing Board is required to adopt an annual resolution that it has made reasonable efforts to recruit a fully prepared teacher before hiring, in accordance with a specified hiring hierarchy, a candidate who is not fully credentialed, clarify that the Board's obligation to take action to approve a notice of intent to employ a provisional internship permit does not require that the item be an action item, and add that the Declaration of Need specify each subject to be listed on the General Education Limited Assignment Single Subject Teaching Permits and the target language on Emergency Bilingual Permits.

Regulation updated to clarify that the district may charge a fee to persons being tested to cover the cost of developing, administering, and grading the district proficiency test, include administrative leave related to dismissal and suspension proceedings and military leave as types of leaves for which the Superintendent or designee may request the Commission on Teacher Credentialing (CTC) to issue a Teaching Permit for Statutory Leave, and add a new section "Early Childhood Education Emergency Specialist Permit/Emergency Transitional Kindergarten Permit" (ETK) which reflects NEW LAW (AB 210, 2022) authorizing the district to request a one-year early childhood education emergency specialist permit which allows the teaching of all subjects in a self-contained transitional kindergarten general education classroom. Regulation also updated to reference NEW LAW (SB 1397, 2022) which requires CTC, until July 1, 2024, to waive the basic skills proficiency requirement for the issuance of an emergency 30-day substitute permit and NEW LAW (AB 1876, 2022) which requires CTC to accept an alternative verification of substitute teaching as part of the requirements for initial issuance of an emergency career substitute teaching permit.

**Fiscal Impact (Cost):**

N/A

**Funding Source:**

N/A

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**Recommended Action:**

- |                                                |                                                                                 |
|------------------------------------------------|---------------------------------------------------------------------------------|
| <input type="checkbox"/> Informational         | <input type="checkbox"/> Denial                                                 |
| <input checked="" type="checkbox"/> Discussion | <input type="checkbox"/> Ratification                                           |
| <input type="checkbox"/> Approval              | <input type="checkbox"/> Explanation: <a href="#">Click here to enter text.</a> |
| <input type="checkbox"/> Adoption              |                                                                                 |

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**Originating Department/School:** Superintendent's Office

**Submitted/Recommended By:**

  
\_\_\_\_\_  
**Lisa DeRosier, Executive Assistant**

**Approved for Submission to the Governing Board:**

  
\_\_\_\_\_  
**Dr. Rhonda Taylor, Superintendent**

**Reviewed by Cabinet Member:** \_\_\_\_\_

**CERTIFICATION**

**Verification of Credentials**

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 **competency** in the subject matter to be taught. The Superintendent or designee shall ensure that persons employed ~~in~~ **to fill** positions requiring certification qualifications possess the appropriate credential, ~~or~~ **or other certification document issued** from the Commission on Teacher Credentialing (CTC) authorizing their employment in such positions. **and fulfill any additional state, federal, or district requirements for the position.**

**The Superintendent or designee shall provide assistance and support to teachers holding preliminary credentials to enable them to meet the qualifications required for the clear credential.**

- (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. 4112.5/4312.5 – Criminal Record Check)*
- (cf. 4113 – Assignment)*
- (cf. 4121 – Temporary/Substitute Personnel)*
- (cf. 5148 – Child Care and Development)*
- (cf. 6178 – Career Technical Education)*
- (cf. 6178.2 – Regional Occupational Center/Program)*
- (cf. 6200 – Adult Education)*

~~All teachers of core academic subjects shall meet the requirements of the No Child Left Behind Act. (20 USC 6319, 7801; 5 CCR 6100-6125)~~

*(cf. 4112.24 – Teacher Qualifications Under the No Child Left Behind Act)*

**Priorities for Hiring Based on Unavailability of Credentialed Teacher**

**The Superintendent or designee shall make reasonable efforts to recruit a fully prepared teacher who is authorized in the subject or setting for each assignment or, when necessary, a fully prepared teacher serving on a local assignment option. Whenever a teacher with a clear or preliminary credential is not available, and the Board adopts a resolution that it has made reasonable efforts to recruit a fully prepared teacher for the assignment, 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 enrolls in an approved internship program in the region of the district and possesses an intern credential**

2. A candidate who is scheduled to complete preliminary credential requirements within six months and who is granted a provisional internship permit (PIP) or short-term staff permit issued by CTC
3. The Board shall take action to approve, at an open Board meeting, a notice of its intent to employ a PIP applicant for a specific position. (5 CCR 80021.1)
4. An individual who has been granted a credential waiver by CTC

Annually, the Board shall, prior to requesting that CTC issue an emergency permit or limited assignment permit, 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 open 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 and limited assigned 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. It shall also specify each subject to be listed on the General Education Limited Assignment Single Subject Teaching Permits and the target language on Emergency Bilingual Permits. 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.

#### **Short-Term Staff Permit**

When a credentialed teacher or intern is not available, the district may request that the CTC issue a short-term staff permit, provisional internship permit (PIP), visiting faculty permit, emergency permit, or credential waiver under the conditions and limitations provided in state or federal law

#### **National Board for Professional Teaching Standards Certification**

The Superintendent or designee shall promote a career continuum that includes participation of district teachers in professional learning that supports their completion of advanced certification awarded by the National Board for Professional Teaching Standards (NBPTS). The Superintendent or designee may coordinate a cohort of teachers through school or district programs or other available networks.

With Board approval and funding, and consistent with the collective bargaining agreement and applicable law, the Superintendent may provide an incentive program for teacher participation in NBPTS certification, which may include:

1. Defraying, subsidizing, or reimbursing the registration, certification, or maintenance fees for NBPTS certification
2. Providing bonuses, step increases, or differential pay for teachers who maintain their certification and continue to teach in the district, with priority given to teachers at Title I schools and schools serving a majority of low-income students
3. Providing substitute teachers to provide release time for participating teachers
4. Providing stipends for teacher participation that match other professional development stipends
5. Compensating mentor teachers who support other teachers' professional learning aligned to NBPTS standards

### **Provisional Internship Permit**

~~When requesting a (PIP), the Board shall approve, as an action item at a public Board meeting, a notice of intent to employ the applicant in the identified position. (5 CCR 80021.1)~~

~~Board shall approve, as an action item at a public Board meeting, a notice of intent to employ the applicant in the identified position. (5 CCR 80021.1)~~

~~Before requesting a visiting faculty permit or emergency permit, the Board shall annually approve a Declaration of Need for Fully Qualified Educators as an action item at a regularly scheduled public Board meeting. (Education Code 44300.1; 5 CCR 80026)~~

~~The Superintendent or designee shall provide support and guidance to noneredentialed teachers in accordance with law to ensure the quality of the instructional program. He/she also may provide assistance and support to staff holding preliminary credentials to help them meet the qualifications required for the professional clear credential.~~

~~(cf. 4131—Staff Development)~~

~~(cf. 4131.1—Beginning Teacher Support/Induction)~~

~~(cf. 4138—Mentor Teachers)~~

### **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 the teacher's certification

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)

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#### *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~~  
~~41520-41522 Teacher Credentialing Block Grant~~  
~~42647 Eligibility to issue warrants~~  
~~44066 Limitations on certification requirements~~  
~~44200-44399 Teacher credentialing, especially:~~  
~~44250-44277 Credential types; minimum requirements~~  
~~44279.1-44279.7 Beginning Teacher Support and Assessment Program~~  
~~44300-44302 Emergency permits and visiting faculty permits~~  
~~44320.2 Teachers' performance assessment~~  
~~44325-44328 District interns~~  
~~44330-44355 Certificates and credentials~~  
~~44380-44387 Alternative certification program~~  
~~44395-44399 National Board for Professional Teaching Standards~~  
~~44420-44440 Revocation and suspension of credentials~~  
~~44450-44468 University internship program~~  
~~44560-44562 Certificated Staff Mentoring Program~~  
~~44735 Teaching as a Priority Block Grant~~  
~~44830-44929 Employment of certificated persons; requirement of proficiency in basic skills~~  
~~56060-56063 Substitute teachers in special education~~

##### CODE OF REGULATIONS, TITLE 5

~~6100-6125 Teacher qualifications, No Child Left Behind Act~~  
~~80001-80674.6 Commission on Teacher Credentialing~~

##### UNITED STATES CODE, TITLE 20

~~6311 Parental notifications~~  
~~6312 Title I local educational agency plan~~  
~~6319 Highly qualified teachers~~  
~~7801 Definitions, highly qualified teacher~~

##### CODE OF FEDERAL REGULATIONS, TITLE 34

~~200.55-200.57 Highly qualified teachers~~  
~~200.61 Parent notification regarding teacher qualifications~~

##### 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 CODED CORRESPONDENCE

~~08-11 Approval of Amendments to Title 5 Regulations Pertaining to Multiple Subject, Single Subject or Education Specialist Short-Term Staff Permit, July 18, 2008~~  
~~08-09 New Online Credential View and Print Process, July 3, 2008~~  
~~07-23 Visiting Faculty Permit, December 14, 2007~~  
~~07-19 Designated Subjects Career Technical Education Teaching Credential, December 14, 2007~~

##### COMMISSION ON TEACHER CREDENTIALING PUBLICATIONS

~~*Teacher Supply in California: A Report to the Legislature*, April 2008~~  
~~*Standards of Quality and Effectiveness for Professional Teacher Induction Programs*, June 2008~~  
~~*The Administrator's Assignment Manual*, rev. September 2007~~

Standards of Quality and Effectiveness for Professional Teacher Preparation Programs, rev. March 2007

California Standards for the Teaching Profession, July 1997

U.S. DEPARTMENT OF EDUCATION GUIDANCE

Improving Teacher Quality State Grants, rev. October 5, 2006

WEB SITES

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

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

California Teacher Credentialing Examinations: <http://www.ctceexams.nesinc.com>

Commission on Teacher Credentialing: <http://www.etc.ca.gov>

Commission on Teacher Credentialing, Commission's Information Guide (for employers' use only):  
<http://www.etc.ca.gov/credentials/cig>

National Board for Professional Teaching Standards: <http://www.nbpts.org>

U.S. Department of Education: <http://www.ed.gov>

**Policy Reference Disclaimer:**

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

State

5 CCR 80001-80674.6

Ed. Code 32340-32341

Ed. Code 35186

Ed. Code 44066

Ed. Code 44200-44418

Ed. Code 44250-44277

Ed. Code 44300-44302

Ed. Code 44325-44328

Ed. Code 44330-44355

Ed. Code 44420-44440

Ed. Code 44450-44468

Ed. Code 44830-44929

Ed. Code 56060-56063

Ed. Code 8295-8305

Federal

20 USC 6312

34 CFR 200.61

Management Resources

Commission on Teacher Credentialing Publication

Description

Commission on Teacher Credentialing

Unlawful issuance of a credential

Complaints regarding teacher vacancy or misassignment

Limitations on certification requirements

Teacher credentialing

Credentials and assignment of teachers

Emergency permit

District interns

Certificates and credentials

Revocation and suspension of credentials

University internship program

Employment of certificated persons; requirement of proficiency in basic skills

Substitute teachers in special education

Child development program personnel qualifications

Description

Title I local educational agency plans; notifications regarding teacher qualifications

Parent notification regarding teacher qualifications

Description

Waiver Requests Guidebook, 2015

Credential Information Guide

Assembly Bill 320: Regional Accreditation for Coursework and Degrees Used for Certification

Purposes, Credential Information Alert 22-02, March 1, 2022

Proposed Amendments and Additions to Title 5 of the California Code of Regulations Pertaining to Subject Matter Competence, Coded Correspondence 21-06, September 20, 2021

Hiring Hierarchy in Education Code 44225.7, Coded Correspondence 13-01, January 30, 2013

Approved Addition and Amendments to Title 5 of the California Code of Regulations Pertaining to Teaching Permit for Statutory Leave (TPSL), Coded

Correspondence 16-10, Aug 23, 2016

California Standards for the Teaching Profession, 2009

<i>Commission on Teacher Credentialing Publication</i>	<i>CL-667 Basic Skills Requirement</i>
<i>Commission on Teacher Credentialing Publication</i>	<i>CL-856 Provisional Internship Permit</i>
<i>Commission on Teacher Credentialing Publication</i>	<i>CL-858 Short-Term Staff Permit</i>
<i>Commission on Teacher Credentialing Publication</i>	<i>Subject Matter Authorization Guideline Book, December 2019</i>
<i>Commission on Teacher Credentialing Publication</i>	<i>Supplementary Authorization Guideline Book, December 2019</i>
<i>Commission on Teacher Credentialing Publication</i>	<i>The Administrator's Assignment Manual, 2021</i>
<i>Court Decision</i>	<i>Association of Mexican-American Educators et al. v. State of California and the Commission on Teacher Credentialing, (1993) 836 F.Supp. 1534</i>
<i>Nat'l Board for Prof. Teaching Stds. Publication</i>	<i>Using Federal Funds for National Board Activities: An Action-Planning Guide</i>
<i>Nat'l Board for Prof. Teaching Stds. Publication</i>	<i>Considerations for Using Federal Funds to Support National Board Certification</i>
<i>Website</i>	<i>California Department of Education, CA NBPTS Certification Incentive Program 2021-26 (<a href="https://www.cde.ca.gov/pd/ps/nbptsprogram.asp">https://www.cde.ca.gov/pd/ps/nbptsprogram.asp</a>)</i>
<i>Website</i>	<i>National Board Resource Center</i>
<i>Website</i>	<i>National Board for Professional Teaching Standards</i>
<i>Website</i>	<i>Commission on Teacher Credentialing</i>
<i>Website</i>	<i>Commission on Teacher Credentialing, Credential Information Guide (for employers' use only)</i>
<i>Website</i>	<i>CSBA</i>
<i>Website</i>	<i>U.S. Department of Education</i>

***Cross References***

<i>Code</i>	<i>Description</i>
<i>0460</i>	<i>Local Control And Accountability Plan</i>
<i>1312.4</i>	<i>Williams Uniform Complaint Procedures</i>
<i>1312.4-E(1)</i>	<i>Williams Uniform Complaint Procedures</i>
<i>1312.4-E(2)</i>	<i>Williams Uniform Complaint Procedures</i>
<i>3580</i>	<i>District Records</i>
<i>4111</i>	<i>Recruitment And Selection</i>
<i>4112</i>	<i>Appointment And Conditions Of Employment</i>
<i>4112.21</i>	<i>Interns</i>
<i>4112.22</i>	<i>Staff Teaching English Learners</i>
<i>4112.5</i>	<i>Criminal Record Check</i>
<i>4112.5-E (1)</i>	<i>Criminal Record Check</i>
<i>4112.6</i>	<i>Personnel Files</i>
<i>4113</i>	<i>Assignment</i>
<i>4114</i>	<i>Transfers</i>
<i>4117.14</i>	<i>Postretirement Employment</i>
<i>4117.3</i>	<i>Personnel Reduction</i>
<i>4119.21</i>	<i>Professional Standards</i>
<i>4119.21-E (1)</i>	<i>Professional Standards</i>
<i>4121</i>	<i>Temporary/Substitute Personnel</i>
<i>4121</i>	<i>Temporary/Substitute Personnel</i>
<i>4131.1</i>	<i>Teacher Support And Guidance</i>
<i>4161.1</i>	<i>Personal Illness/Injury Leave</i>
<i>4161.11</i>	<i>Industrial Accident/Illness Leave</i>
<i>4161.3</i>	<i>Professional Leaves</i>
<i>4161.8</i>	<i>Family Care And Medical Leave</i>
<i>4211</i>	<i>Recruitment And Selection</i>
<i>4212.5</i>	<i>Criminal Record Check</i>

4212.5-E (1)	<i>Criminal Record Check</i>
4212.6	<i>Personnel Files</i>
4219.21	<i>Professional Standards</i>
4219.21-E (1)	<i>Professional Standards</i>
4222	<i>Teacher Aides/Paraprofessionals</i>
4261.11	<i>Industrial Accident/Illness Leave</i>
4261.8	<i>Family Care And Medical Leave</i>
4311	<i>Recruitment And Selection</i>
4312.5	<i>Criminal Record Check</i>
4312.5-E (1)	<i>Criminal Record Check</i>
4312.6	<i>Personnel Files</i>
4317.14	<i>Postretirement Employment</i>
4319.21	<i>Professional Standards</i>
4319.21-E (1)	<i>Professional Standards</i>
4361.1	<i>Personal Illness/Injury Leave</i>
4361.11	<i>Industrial Accident/Illness Leave</i>
4361.8	<i>Family Care And Medical Leave</i>
5145.6	<i>Parental Notifications</i>
5145.6-E (1)	<i>Parental Notifications</i>
5148	<i>Child Care And Development</i>
5148	<i>Child Care And Development</i>
6142.7	<i>Physical Education And Activity</i>
6146.1	<i>High School Graduation Requirements</i>
6146.2	<i>Certificate Of Proficiency/High School Equivalency</i>
6146.2-E (1)	<i>Certificate Of Proficiency/High School Equivalency</i>
6158	<i>Independent Study</i>
6162.51	<i>State Academic Achievement Tests</i>
6163.1	<i>Library Media Centers</i>
6164.2	<i>Guidance/Counseling Services</i>
6170.1	<i>Transitional Kindergarten</i>
6172	<i>Gifted And Talented Student Program</i>
6178	<i>Career Technical Education</i>
6178.1	<i>Work-Based Learning</i>
6183	<i>Home And Hospital Instruction</i>
6200	<i>Adult Education</i>

**CERTIFICATION**

**Verification of Credentials**

The Superintendent or designee shall verify that each employee in a position requiring certification qualifications possesses a valid **certification document** ~~credential or permit~~ 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 Language Learners)~~
- ~~(cf. 4112.23—Special Education Staff)~~
- ~~(cf. 4112.24—Teacher Qualifications Under the No Child Left Behind Act)~~
- ~~(cf. 4121—Temporary/Substitute Personnel)~~
- ~~(cf. 5148—Child Care and Development)~~
- ~~(cf. 6178—Career Technical Education)~~
- ~~(cf. 6178.2—Regional Occupational Center/Program)~~
- ~~(cf. 6200—Adult Education)~~

**The Superintendent or designee shall verify that any person who is employed by the district while CTC is processing the application for certification 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 Records)~~

**Basic Skills Proficiency**

The district shall not initially hire **a person requiring certification**, on a permanent, temporary, or substitute basis, ~~a certificated person seeking employment in the capacity designated in his/her credential~~ 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)

~~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. An out-of-state prepared teacher applying to the CTC for a one-year nonrenewable credential pending completion of the basic skills requirement shall pass the district's basic skills proficiency test which is at least equivalent to the district test required for high school graduation. A person may demonstrate basic skills proficiency in reading, writing, and mathematics by:~~

- 1. Passage of the California Basic Educational Skills Test (CBEST) (Education Code 44252.5, 44274.2; 5 CCR 80071.4, 80413.3)**

2. **Passage of the California Subject Examinations for Teachers: Multiple Subjects plus Writing Skills Examination**
3. **Passage of the California State University (CSU) Early Assessment Program or the CSU Placement Examinations (Education Code 44252)**
4. **Achieving a qualifying score on the Scholastic Aptitude Test or the American College Test (Education Code 44252)**
5. **Achieving a qualifying score on College Board Advanced Placement Examinations**
6. **Passage of a basic skills examination from another state**
7. **Qualifying coursework (Education Code 44252)**
8. **Qualifying coursework and exams (Education Code 44252)**
9. **The district may hire a certificated employee who has not taken a test of basic skills proficiency if the employee has not yet been afforded the opportunity to take the test, provided that the employee takes the test at the earliest opportunity. The employee may remain employed by the district pending the receipt of the test results. (Education Code 44830)**

**An out-of-state prepared teacher shall meet the basic skills requirement within one year of being issued a California preliminary credential by CTC unless the teacher has completed a basic skills proficiency test in another state, passed a basic skills proficiency test developed and administered by the district, by cooperating districts or by the county office of education (COE), 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)**

**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 persons being tested to cover the costs of developing, administering, and grading the district proficiency test. (Education Code 44252, 44830)**

*(ef. 6146.1—High School Graduation Requirements)*

*(ef. 6146.2—Certificate of Proficiency)*

*(ef. 6162.5—High School Exit Examination)*

### **Short-Term Staff Permit**

The district may request that the CTC issue a short-term staff permit (STSP) to an applicant ~~who meets the qualifications specified in 5 CCR 80021~~ 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 internship program
4. Inability of the applicant to enroll in an approved internship program due to timelines or lack of space in the program
5. Unavailability of a third-year extension of an internship program or the applicant's withdrawal from an internship 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)**

When requesting issuance of an STSP, the district shall submit to the CTC: (5 CCR 80021)

1. Verification that it has conducted a local recruitment for the permit being requested
2. Verification that it 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)*

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** ~~The district may request that the CTC issue a provisional internship permit (PIP) to an applicant who meets the qualifications specified in 5 CCR 80021.1 whenever a suitable credentialed teacher cannot be found after~~ **the district shall conduct a diligent search for a suitable credentialed teacher or intern, including, but not limited to, distributing job announcements, contracting college and university placement centers, and advertising in print or electronic media.**

**Whenever a suitable credentialed teacher cannot be found after a diligent search, the Superintendent or designee may request that 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** ~~The district shall verify all 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.

~~The search shall include, but not be limited to, distributing job announcements, contacting college and university placement centers, and advertising in print or electronic media.~~

~~(cf. 4111/4211/4311—Recruitment and Selection)~~

2. Orientation, guidance, and assistance ~~shall~~ **will** be provided to the permit holder as specified in 5 CCR 80026.5.

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 COE, and who has completed at least three years of full-time classroom teaching experience** ~~Superintendent or designee shall assign an experienced educator to guide and assist the permit holder.~~

3. The district ~~shall~~ **will** 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~~ **will** 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~~ states 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 internship 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)

### **~~Credential Waiver/Long-Term Emergency Permits~~**

~~If a teacher who has completed a teacher preparation program is unavailable for an assignment, the district 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 internship program in the region of the district~~
- ~~2. — A candidate who is scheduled to complete preliminary credential requirements within six months and who is provided orientation, guidance, and assistance by the district~~

~~If an individual who meets the criteria specified in item #1 or 2 above is not available to the district, the district may, as a last resort, request from the CTC a credential waiver or an emergency permit for the assignment of an individual who does not meet those criteria. (Education Code 44225.7; 5 CCR 80023-80023.2, 80026)~~

~~The district may request an emergency permit authorizing resource specialist, Crosscultural, Language and Academic Development (CLAD), bilingual, or teacher librarian services.~~

~~In order to request an emergency permit, the district shall annually submit a Board approved Declaration of Need for Fully Qualified Educators on a form provided by the CTC. The declaration shall include certification that the district has made reasonable efforts to recruit a fully prepared teacher for the assignment. (Education Code 44225.7; 5 CCR 80023.2, 80026)~~

~~The Superintendent or designee shall provide any first-time recipient of an emergency teaching permit with an orientation to teaching which, to the extent reasonably feasible, shall occur before he/she begins a teaching assignment. The orientation shall include, but not be limited to, the curriculum the teacher is expected to teach and effective techniques of classroom instruction 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)~~

### **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, administrative leave related to dismissal and suspension proceedings, military 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 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 CTC, the district shall provide the applicant with 45 hours of preparation in the content areas listed in 5 CCR 80022. (5 CCR 80022)**

**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 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 and 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)**

**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 CTC issue an emergency resource specialist permit, emergency teacher librarian services permit, emergency crosscultural language and academic development permit (CLAD), 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 beginning 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 COE and who has completed at least three years of full-time classroom teaching experience. (5 CCR 80026.5)**

**Early Childhood Education Emergency Specialist Permit/Emergency Transitional Kindergarten Permit (ETK)**

**If, after conducting a diligent search, the district has been unable to recruit a sufficient number of certificated teachers, including teacher candidates pursuing full certification through internship, district internship, or other alternative routes established by CTC, the Superintendent or designee may request CTC to issue a one-year early childhood education (ECE) emergency specialist permit that authorizes the teacher to teach all subjects in a self-contained transitional kindergarten (TK) general education classroom. (Education Code 44300)**

**The request to CTC shall include the following justifications for the need for the ECE emergency specialist permit: (Education Code 44300)**

- 1. Annual documentation that the district has adopted in policy and practice a process for conducting a diligent search as defined in Education Code 44300**
- 2. A Declaration of Need for Fully Qualified Educators based on the documentation set forth in Item #1, and adopted by the Board at a regularly scheduled Board meeting**
- 3. Verification that the district will provide the required orientation, mentoring, and support**
- 4. The Board's receipt, at a regularly scheduled Board meeting, of a report on the orientation, mentoring, and support described in Item #3**

**The district may request CTC to renew the ECE emergency specialist permit for one additional year provided the following occurs: (Education Code 44300)**

- 1. The applicant verifies current enrollment in a commission-approved teacher preparation program that will result in a credential authorizing teaching TK**
- 2. The district submits a Declaration of Need for Fully Qualified Educators in the same manner as described in Item #2, above**
- 3. The district verifies that the applicant continues to successfully serve in the assignment on the basis of the ECE emergency specialist permit**

**The district verifies continued orientation, mentoring, and support, with reporting to the Board in the same manner as described in Item #3, above**

## **Emergency Substitute Teaching Permits**

The district may employ ~~for day-to-day substitute teaching, at any grade level, a person with an emergency substitute permit issued by the CTC with the following restrictions 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 CBEST, shall not serve as a substitute for more than 30 days for any one teacher during the school year. ~~He/she shall not serve or~~ 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 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 substitute permit for career technical education shall teach only in a program of technical, trade, or vocational education and 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)

# LAKESIDE UNION SCHOOL DISTRICT

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Governing Board Meeting Date: 4/11/24

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**Agenda Item:**

Board Policy 4154/4254/4354: Health and Welfare Benefits

**Background (Describe purpose/rationale of the agenda item):**

First Reading: Clarifying minor changes.

**Fiscal Impact (Cost):**

N/A

**Funding Source:**

N/A

**Recommended Action:**

- |                                                |                                                                                |
|------------------------------------------------|--------------------------------------------------------------------------------|
| <input type="checkbox"/> Informational         | <input type="checkbox"/> Denial                                                |
| <input checked="" type="checkbox"/> Discussion | <input type="checkbox"/> Ratification                                          |
| <input type="checkbox"/> Approval              | <input type="checkbox"/> Review <small>Click here to enter text.</small>       |
| <input type="checkbox"/> Adoption              | <input type="checkbox"/> Explanation: <small>Click here to enter text.</small> |

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**Originating Department/School:** Superintendent's Office

**Submitted/Recommended By:**

  
\_\_\_\_\_  
Lisa DeRosier, Executive Assistant

**Approved for Submission to the Governing Board:**

  
\_\_\_\_\_  
Dr. Rhonda Taylor, Superintendent

**Reviewed by Cabinet Member:** 

**HEALTH AND WELFARE BENEFITS**

The Governing Board recognizes that health and welfare benefits are essential to promote employee health and productivity and are an important part of the compensation offered to employees. The district shall provide health and welfare benefits for employees in accordance with state and federal law and subject to negotiated employee agreements.

**Certificated and Classified** management, administrative, **supervisory** and confidential employees who are not in bargaining units shall receive the same health and welfare benefits as those specified in the collective bargaining agreement for certificated employees.

*(cf. ~~4300~~ Administrative and Supervisory Personnel)*

For purposes of granting benefits, a registered domestic partner and ~~his/her~~ **their** child shall have the same rights, protections, and benefits as a spouse and spouse's child. (Family Code 297.5, 300)

The district shall offer full-time employees who work an average of 30 hours or more per week and their dependents up to age 26 years a health insurance plan that includes coverage for essential health benefits, pays at least 60 percent of the medical expenses covered under the terms of the plan, and meets all other requirements of the federal Patient Protection and Affordable Care Act.

With respect to eligibility to participate in the health benefits plan or the level of health benefits provided, the district shall not discriminate in favor of employees who are among the highest paid 25 percent of all district employees. (26 USC 105; 42 USC 300gg-16)

**Continuation of Coverage**

Retired certificated employees, other employees who would otherwise lose coverage due to a qualifying event specified in law and administrative regulation, and their qualified beneficiaries may continue to participate in the district's group health and welfare benefits in accordance with state and federal law.

Unless otherwise provided for in the applicable collective bargaining agreement, covered employees and their qualified beneficiaries may receive continuation coverage by paying the premiums, dues, and other charges, including any increases in premiums, dues, and costs incurred by the district in administering the program.

**Confidentiality**

The Superintendent or designee shall not use or disclose any employee's medical information the district possesses without the employee's authorization obtained in accordance with Civil Code 56.21, except for the purpose of administering and maintaining employee benefit plans and for other purposes specified in law. (Civil Code 56.20)

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

## Management

- ~~1. The District shall provide management team employees and retired management team employees who are at least 55 years old and have completed a minimum of ten (10) years of service in the Lakeside Union School District with fully paid term life insurance coverage until age 65.~~
2. The District shall provide health benefits **only** to retiring **certificated and classified** management, **administrative, supervisory, and confidential** team employees, until age 65, who retire after they are age 55 and have completed a minimum of ten (10) years of service and the employee's most recent service prior to retirement was as a manager in the Lakeside Union School District. Management employees employed in the District as of July 10, 1990, shall not be subject to age 65 limitations.

### *Policy Reference Disclaimer:*

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

<u>State</u>	<u>Description</u>
<i>Civ. Code 56.10-56.16</i>	<i>Disclosure of information by medical providers</i>
<i>Civ. Code 56.20-56.245</i>	<i>Use and disclosure of medical information by employers</i>
<i>Ed. Code 17566</i>	<i>Self-insurance fund</i>
<i>Ed. Code 35208</i>	<i>Liability insurance</i>
<i>Ed. Code 35214</i>	<i>Liability insurance (self-insurance or a combination of self-insurance and insurance through an insurance company)</i>
<i>Ed. Code 44041-44042</i>	<i>Payroll deductions for collection of premiums</i>
<i>Ed. Code 44986</i>	<i>Leave of absence; state disability benefits</i>
<i>Ed. Code 45136</i>	<i>Benefits for classified employees</i>
<i>Ed. Code 7000-7008</i>	<i>Health and welfare benefits; retired certificated employees</i>
<i>Fam. Code 297-297.5</i>	<i>Rights, protections, benefits under the law; registered domestic partners</i>
<i>Fam. Code 300</i>	<i>Definition of marriage</i>
<i>Gov. Code 12940</i>	<i>Unlawful discriminatory employment practices</i>
<i>Gov. Code 22750-22944</i>	<i>Public Employees' Medical and Hospital Care Act</i>
<i>Gov. Code 53200-53210</i>	<i>Group insurance</i>
<i>H&amp;S Code 1366.20-1366.29</i>	<i>Cal-COBRA program; health insurance</i>
<i>H&amp;S Code 1367.08</i>	<i>Disclosure of fees and commissions paid related to health care service plan</i>
<i>H&amp;S Code 1373</i>	<i>Health services plan; coverage for dependent children</i>
<i>H&amp;S Code 1373.621</i>	<i>Continuation coverage; age 60 or older after five years with district</i>

<i>H&amp;S Code 1374.58</i>	<i>Coverage for registered domestic partners; health service plans and health insurers</i>
<i>Ins. Code 10116.5</i>	<i>Continuation coverage; age 60 or older after five years with district</i>
<i>Ins. Code 10128.50-10128.59</i>	<i>Cal-COBRA program; disability insurance</i>
<i>Ins. Code 10277-10278</i>	<i>Group and individual health insurance; coverage for dependent children</i>
<i>Ins. Code 10604.5</i>	<i>Annual disclosure of fees and commissions paid</i>
<i>Ins. Code 12670-12692.5</i>	<i>Conversion coverage</i>
<i>Lab. Code 2800.2</i>	<i>Notification of availability of continuation health coverage</i>
<i>Lab. Code 4856</i>	<i>Health benefits for spouse of peace officer killed in performance of duties</i>
<i>Unemp. Ins. Code 2613</i>	<i>Disability insurance; notice of rights and benefits</i>
<u><i>Federal</i></u>	<u><i>Description</i></u>
<i>1 USC 7</i>	<i>Definition of marriage and spouse</i>
<i>26 CFR 1.105-11</i>	<i>Self-insured medical reimbursement plan</i>
<i>26 CFR 54.4980B-1-54.4980B-10</i>	<i>COBRA continuation coverage</i>
<i>26 CFR 54.4980H-1-54.4980H-6</i>	<i>Patient Protection and Affordable Care Act</i>
<i>26 USC 105</i>	<i>Self-insured medical reimbursement plan; definition of highly compensated individual</i>
<i>26 USC 4980B</i>	<i>COBRA continuation coverage</i>
<i>26 USC 4980H</i>	<i>Penalty for noncompliance with employer-provided health care requirements</i>
<i>26 USC 5000A</i>	<i>Minimum essential coverage</i>
<i>26 USC 6056</i>	<i>Report of health coverage provided to employees</i>
<i>29 USC 1161-1168</i>	<i>COBRA continuation coverage</i>
<i>42 USC 1395-1395g</i>	<i>Medicare benefits</i>
<i>42 USC 300gg-16</i>	<i>Group health plan; nondiscrimination in favor of highly compensated individuals</i>
<i>42 USC 300gg-300gg95</i>	<i>Patient Protection and Affordable Care Act</i>
<i>45 CFR 164.500-164.534</i>	<i>Privacy of individually identifiable health information</i>
<u><i>Management Resources</i></u>	<u><i>Description</i></u>
<i>CSBA Publication</i>	<i>Health Policy: Implications of Covered California for School Boards, Districts and Personnel, Governance Brief, January 2013</i>
<i>Internal Revenue Service Notification</i>	<i>2011-1 Affordable Care Act Nondiscrimination Provisions Applicable to Insured Group Health Plans</i>

*U.S. Department of Treasury Publication*

*Fact Sheet: Final Regulations Implementing Employer Shared Responsibility Under the Affordable Care Act (ACA) for 2015*

*Website*

*CSBA District and County Office of Education Legal Services*

*Website*

*U.S. Department of Health and Human Services, Centers for Medicare and Medicaid Services*

*Website*

*California Employment Development Department*

*Website*

*Internal Revenue Service*

*Website*

*U.S. Department of Labor*

*Website*

*CSBA*

*Cross References*

*Code*

*Description*

*1340*

*Access To District Records*

*3100*

*Budget*

*3460*

*Financial Reports And Accountability*

*3530*

*Risk Management/Insurance*

*4030*

*Nondiscrimination In Employment*

*4112.6*

*Personnel Files*

*4112.9*

*Employee Notifications*

*4112.9-E(1)*

*Employee Notifications*

*4113.5*

*Working Remotely*

*4117.11*

*Preretirement Part-Time Employment*

*4118*

*Dismissal/Suspension/Disciplinary Action*

*4121*

*Temporary/Substitute Personnel*

*4140*

*Bargaining Units*

*4141*

*Collective Bargaining Agreement*

*4141.6*

*Concerted Action/Work Stoppage*

*4151*

*Employee Compensation*

*4157.1*

*Work-Related Injuries*

*4161*

*Leaves*

*4161.1*

*Personal Illness/Injury Leave*

*4161.11*

*Industrial Accident/Illness Leave*

*4161.8*

*Family Care And Medical Leave*

*4212.6*

*Personnel Files*

*4212.9*

*Employee Notifications*

4212.9-E(1)	<i>Employee Notifications</i>
4213.5	<i>Working Remotely</i>
4217.11	<i>Preretirement Part-Time Employment</i>
4218	<i>Dismissal/Suspension/Disciplinary Action</i>
4240	<i>Bargaining Units</i>
4241	<i>Collective Bargaining Agreement</i>
4241.6	<i>Concerted Action/Work Stoppage</i>
4251	<i>Employee Compensation</i>
4257.1	<i>Work-Related Injuries</i>
4261	<i>Leaves</i>
4261	<i>Leaves</i>
4261.1	<i>Personal Illness/Injury Leave</i>
4261.11	<i>Industrial Accident/Illness Leave</i>
4261.8	<i>Family Care And Medical Leave</i>
4300	<i>Administrative And Supervisory Personnel</i>
4312.6	<i>Personnel Files</i>
4312.9	<i>Employee Notifications</i>
4312.9-E(1)	<i>Employee Notifications</i>
4313.5	<i>Working Remotely</i>
4317.11	<i>Preretirement Part-Time Employment</i>
4340	<i>Bargaining Units</i>
4351	<i>Employee Compensation</i>
4357.1	<i>Work-Related Injuries</i>
4361	<i>Leaves</i>
4361.1	<i>Personal Illness/Injury Leave</i>
4361.11	<i>Industrial Accident/Illness Leave</i>
4361.8	<i>Family Care And Medical Leave</i>
9250	<i>Remuneration, Reimbursement And Other Benefits</i>
9250-E(1)	<i>Remuneration, Reimbursement And Other Benefits</i>

*Legal Reference:*

*EDUCATION CODE*

*7000-7008 Health and welfare benefits, retired certificated employees*

*17566 Self insurance fund*

*35208 Liability insurance*

*35214 Liability insurance (self insurance)*

*44041-44042 Payroll deductions for collection of premiums*

*44986 Leave of absence, state disability benefits*  
*45136 Benefits for classified employees*  
**CIVIL CODE**  
*56.10-56.16 Disclosure of information by medical providers*  
*56.20-56.245 Use and disclosure of medical information by employers*  
**FAMILY CODE**  
*297-297.5 Rights, protections and benefits under law; registered domestic partners*  
**GOVERNMENT CODE**  
*12940 Discrimination in employment*  
*22750-22944 Public Employees' Medical and Hospital Care Act*  
*53200-53210 Group insurance*  
**HEALTH AND SAFETY CODE**  
 1366.20-1366.29 Cal-COBRA program, health insurance  
 1367.08 Disclosure of fees and commissions paid related to health care service plan  
 1373 Health services plan, coverage for dependent children who are full-time students  
 1373.621 Continuation coverage, age 60 or older after five years with district  
 1374.58 Coverage for registered domestic partners, health service plans and health insurers  
**INSURANCE CODE**  
 10116.5 Continuation coverage, age 60 or older after five years with district  
 10128.50-10128.59 Cal-COBRA program, disability insurance  
 10277-10278 Group and individual health insurance, coverage for dependent children  
 10604.5 Annual disclosure of fees and commissions paid  
 12670-12692.5 Conversion coverage  
**LABOR CODE**  
 2800.2 Notification of conversion and continuation coverage  
 4856 Health benefits for spouse of peace officer killed in performance of duties  
**UNEMPLOYMENT INSURANCE CODE**  
 2613 Education program; notice of rights and benefits  
**UNITED STATES CODE, TITLE 1**  
 7 Definition of marriage, spouse  
**UNITED STATES CODE, TITLE 26**  
 105 Self-insured medical reimbursement plan; definition of highly compensated individual  
 4980B COBRA continuation coverage  
 4980H Penalty for noncompliance with employer-provided health care requirements  
 5000A Minimum essential coverage  
 6056 Report of health coverage provided to employees  
**UNITED STATES CODE, TITLE 29**  
 1161-1168 COBRA continuation coverage  
**UNITED STATES CODE, TITLE 42**  
 300gg-300gg95 Patient Protection and Affordable Care Act, especially:  
 300gg-16 Group health plan; nondiscrimination in favor of highly compensated individuals  
 1395-1395g Medicare benefits  
**CODE OF FEDERAL REGULATIONS, TITLE 26**  
 54.4980B-1-54.4980B-10 COBRA continuation coverage  
 54.4980H-1-54.4980H-6 Patient Protection and Affordable Care Act  
 1.105-11 Self-insured medical reimbursement plan  
**CODE OF FEDERAL REGULATIONS, TITLE 45**  
 164.500-164.534 Health Insurance Portability and Accountability Act (HIPAA)

**Management Resources:**

**CALIFORNIA SCHOOL BOARDS ASSOCIATION PUBLICATIONS**  
 Health Policy: Implications of Covered California for School Boards, Districts and Personnel, Governance Brief, January 2013  
**INTERNAL REVENUE SERVICE NOTICES**  
 2011-1 Affordable Care Act Nondiscrimination Provisions Applicable to Insured Group Health Plans  
**U.S. DEPARTMENT OF TREASURY PUBLICATIONS**  
 Fact Sheet: Final Regulations Implementing Employer Shared Responsibility Under the Affordable Care Act (ACA) for 2015  
**WEB SITES**

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

California Employment Development Department: <http://www.edd.ca.gov>

Internal Revenue Service: <http://www.irs.gov>

U.S. Department of Health and Human Services, Centers for Medicare and Medicaid Services:  
<http://www.cms.gov>

U.S. Department of Labor: <http://www.dol.gov>

Policy  
adopted: September 17, 2012  
revised: ~~July 12, 2018~~

LAKESIDE UNION SCHOOL DISTRICT  
Lakeside, California