

LAKESIDE UNION SCHOOL DISTRICT

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

May 9, 2024

Closed Session: 5:00 p.m.

Open Session: 6:00 p.m.

AMENDED 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 Chief Negotiator, Lisa Davis, regarding the California School Employees Association and its Chapter 240, pursuant to Government Code §54957.6;
2. Conference with Chief Negotiator, Lisa Davis, regarding the Lakeside Teachers Association, pursuant to Government Code §54957.6;
3. **Conference with Legal Counsel - Existing Litigations - (paragraph (1) of subdivision (D)) of Government Code §54956.9 (CSEA Grievance)**
4. Public Employee Discipline/Dismissal/Release pursuant to Government Code §54957;
5. 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 Lakeside Farms. Following the pledge Principal Jim Rosa will share highlights from the school.

E. RECOGNITIONS

The Board will recognize the Employees of the Year for 2023-24, including Lei Li, our Teacher of the Year and Kent Cable, our Classified Employee of the Year.

F. TRUSTEE REPORTS AND COMMENTS

Trustees will report and comment as desired.

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. PRESENTATION

Dr. Danielle Clark will present an annual Special Education update.

I. PUBLIC HEARINGS/ACTION ITEMS

1. **PUBLIC HEARING:** The Governing Board will conduct a public hearing to receive input regarding an Initial Proposal with the California School Employees Association and its Chapter 240 so negotiations can commence for the 2024-2025 school year.
2. **Acknowledgement** is requested of the Initial Proposal from the California School Employees Association and its Chapter 240 for the 2024-2025 school year.
3. **Approval** is requested of the Initial Proposal from the District to the California School Employees Association and its Chapter 240 for the 2024-2025 school year.

J. 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 April 11, 2024.
- 2.2 **Adoption** is requested of Resolution No. 2024-24, recognizing and honoring the classified employees for their caring and incalculable contribution to the children of Lakeside.
- 2.3 **Adoption** is requested of Resolution No. 2024- 26, ensuring parents have the knowledge of their rights in regards to their children's education.
- 2.4 **Adoption** is requested of the revised 2024-2025 school and employee calendar with minor changes to report card dates.

HUMAN RESOURCES

- 3.1 **Approval/Ratification** is requested of Personnel Assignment Order 2024-12.
"Igniting Passion in Today's Students for Tomorrow's Opportunities"

J. 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 **Adoption** of the following Resolutions A) 2024-20, Authorized Agents to Receive and Pick-Up Mail; B) 2024-21, Payment Order; C) 2024-22, Authorized Agent to Sign School Orders; and D) 2024-23, Authorized Replacement of Warrants.
- 4.3 **Approval** is requested of the following annual contracts for the 2023-2024 school year: A) Artbeat San Diego (Lakeview); B) Brenda Wilson Addendum (SPED); C) Helping Our Way (Lakeview); KF Enterprises (Lakeview); D) Solana Center for Environmental Innovation (Riverview); E) Consulting & Inspection Services-Technology Building (Maintenance); F) Consulting & Inspection Services-Lakeside Farms (Maintenance); G) Stephen Halfaker (Superintendent); H) Psychology 360 (SPED); I) Quadient Leasing (Superintendent); J) SDCOE-CTE Grant (Ed Services); K) 4 Parent/Student Transportation Agreements (SPED/Pupil Services); L) El Capitan Stadium Association (Maintenance); M) Math Transformations Addendum (LMS); and N) Helping Our Way (DREAM).
- 4.4 **Approval** is requested of the following annual contracts for the 2024-2025 school year: A) Ron and Karen Cook (Superintendent); B) CODESP (HR); C) Dannis Woliver Kelley Attorney (Superintendent); D) Melodee Rupe (Business); E) Ed Press (Business) E) Renaissance (Ed Services).
- 4.5 **Adoption** is requested of Resolution No. 2024-25, allowing temporary transfer of money between funds.
- 4.6 **Approval** to amend the 2023-2024 work calendar for 11-month employees with a minor change.
- 4.7 **Approval** is requested to award Kyocera for Copier/MFD Hardware and All Copy Products for printer services and supplies, districtwide.
- 4.8 **Approval** is requested of a new district-wide phone system and E911 upgrade through a piggyback contract through TIPS #230504, in the amount of \$379,506.24
- 4.9 **Approval** is requested of After School Education and Safety Program (ASES) grant for the 2023-24 school year in the amount of \$660,633.05.
- 4.10 **Approval** is requested of the following gifts to the District: A) Lakeside Kiwanis donated socks and shoes to Lindo Park; and B) April PTA donations: \$1,496.25 to Lakeside Farms, \$1,142.50 to Lindo Park.

ED SERVICES

- 5.1 **Adoption** is requested of the K-8 History-Social Studies curriculum. The TCI curriculum was piloted for 18-months, whereby several curriculums were considered. TCI was selected by both elementary and middle school pilot teachers at a cost of \$532,547.

J. BOARD POLICIES, ADMINISTRATIVE REGULATIONS AND/OR EXHIBITS

- 6.1 **Approval** is requested of Board Policy and Administrative Regulation 0460: Local Control and Accountability Plan.
- 6.2 **Approval** is requested of Board Policy and Administrative Regulation 3311: Bids.
- 6.3 **Approval** is requested of Board Policy and Administrative Regulation 3400: Management of District Assets/Accounts.
- 6.4 **Approval** is requested of Board Policy and Administrative Regulation 4112.2: Certification.
- 6.5 **Approval** is requested of Board Policy 4154/4254/4354: Health and Welfare Benefits.

K. DISCUSSION ITEMS

Miscellaneous:

1. Enrollment Report for Month 8 (3/4/24-3/29/24)
2. Quarterly Investment Report
3. Legislative Updates

First Readings:

4. Administrative Regulation and Exhibits 1312.4: Williams Uniform Complaint Procedures.
5. Board Policy and Administrative Regulation 1330: Use of School Facilities.
6. Board Policy 4140/4240: Bargaining Units.
7. Board Policy 5116.2: Involuntary Student Transfers.
8. Board Policy 6162.5: Student Assessment.
9. Board Policy 6170.1: Transitional Kindergarten.

L. REPORTS TO THE BOARD

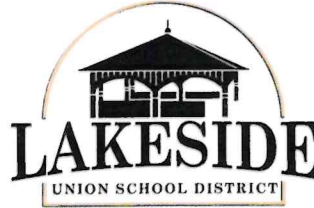
1. Union Representatives:
 - A. **Kerry Strong**, will present comments as the Lakeside Teachers Association President.
 - B. **David Myers**, will present comments as the California School Employees Association President.
2. District Superintendents
 - A. **Lisa Davis** will present business and operations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

M. ADJOURNMENT

Respectfully Submitted,
Rhonda L. Taylor, Ed.D.
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

NOTICE OF PUBLIC HEARING

At the special board meeting of May 9, 2024, the Board of Trustees will conduct a public hearing pursuant to Government Code §3547(a), to receive input regarding the Initial Proposal from the California School Employees Association and its Chapter No. 240 to the District regarding re-openers for the 2024-25 school year, so that negotiations may commence.

The public hearing will be held on Thursday, May 9, 2024.

May 1, 2024

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

Igniting Passion in Today's Students for Tomorrow's Opportunities!

12335 Woodside Avenue • Lakeside, California 92040
DISTRICT OFFICE 619.390.2600 • FAX 619.561.7929 • <http://www.lsusd.net/>



California
School
Employees
Association

6341 Nancy Ridge Drive
San Diego, CA 92121

(858) 458-0300
(800) 675-9939

www.csea.com

Adam Weinberger
Association President

Keith Pace
Executive Director

Member of the AFL-CIO

The nation's largest
independent classified
employee association



April 23, 2024

Via Electronic Mail

lisadavis@lsusd.net

Lisa Davis, Assistant Superintendent Business Services
Lakeside Union School District
12335 Woodside Ave.
Lakeside, CA 92040

Re: Sunshine Letter 2nd Year Reopeners 2024-2025

Dear Lisa:

The following will serve as CSEA Chapter 240's sunshine proposal for the 2nd Year Reopeners 2024-2025.

CSEA will open the following articles:

1. **ARTICLE 10: SALARIES**
2. **ARTICLE 12: EMPLOYEE BENEFITS**
3. **ARTICLE 19: VACATION**
4. **ARTICLE 21: PROMOTION**

The above articles are being sunshine pursuant to Government Code §3547 (a) and CSEA Chapter # 240 is respectfully requesting this letter to be submitted to the Board of Education for public review and comment.

Respectfully,

CALIFORNIA SCHOOL EMPLOYEES ASSOCIATION

Joni Collins
Labor Relations Representative

Cc: David Myers, Chapter 240 President, Matt Busacco Region 96 Representative, Troy Johnson Area K Director, Angela Schwab Senior Labor Relations Representative, Gary Snyder, Field Director, file.



**The California School Employees Association
and its
Lakeside Chapter # 240
Initial Proposals for 2024-2025
2nd Year Reopeners
to the
Lakeside Union School District**

Pursuant to the Educational Employees Relations Act (EERA) and Article 26.1 of the current Collective Bargaining Agreement (CBA) between the Lakeside Union School District and the California School Employees Association (CSEA) and its Chapter #240, CSEA submits initial proposal to meet and negotiate with the District for 2024-2025 2nd Year Reopener Contract.

ARTICLE 10: SALARIES

All bargaining unit positions under minimum wage will be brought up and take effect effective January 1, 2025. The District will square the CSEA bargaining unit salary schedule upward with minimum of 2.5% between ranges and 5% between steps. CSEA proposes a fair and equitable salary increase. If any other bargaining unit or employee group within the District receives an increase in salary the same percent shall be applied to the classified bargaining unit.

ARTICLE 12: EMPLOYEE BENEFITS

The District shall pick up any increase cost of health and welfare benefits for the 2024-2025 school year for all employees in the bargaining unit who currently qualify for health welfare benefits.

ARTICLE 19: VACATION

19.7 CSEA proposes to add language to clarify.

ARTICLE 21: PROMOTION

12.1 CSEA proposes to add language to clarify.

These shall be considered initial proposals. CSEA retains the right to amend, modify, add to or delete.

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: May 9, 2023

Agenda Item:

Adoption of Initial Proposal to the California School Employees Association and its Lakeside Chapter 240.

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

Adoption is requested of the District's Initial Re-opener Proposal to the California School Employees Association and its Lakeside Chapter 240 so that negotiations may commence for the 2024-25 school year.

Fiscal Impact (Cost):

None

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: Click here to enter text. |
| <input type="checkbox"/> Adoption | |

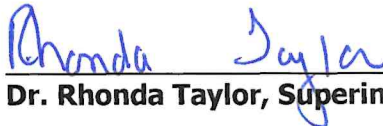
Originating Department/School: Business Services

Submitted/Recommended By:

Approved for Submission to the Governing Board:



Lisa Davis, Assistant Superintendent



Dr. Rhonda Taylor, Superintendent

Reviewed by Cabinet Member _____

**Initial Proposal
of the
Lakeside Union School District
to the
California School Employees Association
and its Lakeside Chapter 240**

For the 2024-25 School Year

For limited reopener negotiations for the 2024-25 school year pursuant to Article 26.1 of the 2022-2025 Agreement between the Lakeside Union School District and the California School Employees Association and its Lakeside Chapter No. 240 (CSEA).

The District reserves the right to modify, amend, delete, or add to its proposal throughout the course of negotiations.

The purpose of this Agreement is to promote the improvement of personnel management and employer-employee relations, provide an equitable and peaceful procedure for the resolution of differences, and establish rates of pay and other terms and conditions of employment.

The District proposes the following:

ARTICLE 9: DUTY HOURS

9.5. through 9.5.4: Overtime:

Clarify conflicting language regarding Overtime pay in sub articles 9.5 through 9.5.4.

ARTICLE 10: SALARIES

Shall reopen automatically

ARTICLE 12: HEALTH BENEFITS

Shall reopen automatically.

12.4 language was negotiated in 23-24, however, would not become effective until the 24-25 fiscal year. Health rates change effective every January and agreement was not approved by the board until February 2024.

- 12.4 District will explore cost of 75/25 split, "The parties acknowledge that the ongoing cost of the January 1, 2025 implementation of a 75/25 split in Article 12.4 will be included in total compensation negotiations for the 2024-2025 school year."

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: 5/9/24

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 April 11, 2024

Fiscal Impact (Cost):

N/A

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: Click here to enter text. |
| <input checked="" type="checkbox"/> Adoption | |

Originating Department/School: Superintendent's Office

Submitted/Recommended By:

Approved for Submission to the Governing Board:



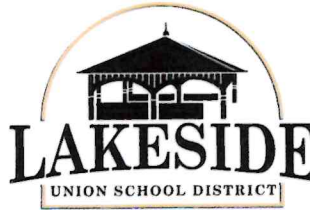
Lisa DeRosier, Executive Assistant



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 Regular Meeting of the Board of Trustees

April 11, 2024
District Administration Center

- | | |
|--|---|
| <p>A. The regular meeting of the Lakeside Union School District Board of Trustees was called to order at 5:00 p.m. by Andrew Hayes, President, with the following members present: Lara Hoefer Moir, Vice President; 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. 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
Comments</p> |
| <p>C. At 5:01 p.m., the Governing Board moved to closed session to discuss the following: 1) Conference with Legal Counsel (WPCB Law Firm) – Existing Litigation – Superior Court Case #37-2023-00055188-CU-PO-CTL pursuant to Government Code §54956.9; 2) Public Employee Discipline/Dismissal/Release, pursuant to Government Code §54957; and 3) Public Employee Evaluation, Superintendent, pursuant to Government Code §54957.</p> | <p>Closed Session</p> |
| <p>D. The Board reconvened at 6:00 p.m. President Hayes welcomed visitors and reported on closed session items as follows:</p> <ol style="list-style-type: none"> 1. No action was taken on Conference with Legal Counsel (WPCB Law Firm) – Existing Litigation – Superior Court Case #37-2023-00055188-CU-PO-CTL pursuant to Government Code §54956.9. 2. No action was taken on Public Employee Discipline/Dismissal/Release, pursuant to Government Code §54957. 3. No action was taken on Public Employee Evaluation, Superintendent, pursuant to Government Code §54957. <p>Kai Grobner from Riverview International Academy led the pledge of allegiance. Following the pledge, Principal Grace Cox and TOSA, Carolyn Hood, shared highlights from the school and programs. Some highlights shared were: Striving for greatness, MTSS, SEL, language immersion programs, pride in curriculum, steam, music, weekly broadcasts, student recognitions, and so much more! She commented that they are not just a school, but a family.</p> | <p>Reconvene
Welcome Visitors</p> <p>Closed Session
Report</p> <p>Flag Salute
RV/WG
Spotlight</p> |
| <p>E. Clerk Bennett had no formal report.</p> <p>Member Ellenson had no formal report.</p> <p>Member Kasper is looking forward to the upcoming Western Days parade. He commented that there are a lot of volunteer opportunities rodeo weekend.</p> <p>Vice President Hoefer Moir had no formal report.</p> <p>President Hayes is looking forward to the rodeo and the parade.</p> | <p>Trustee Reports
and Comments</p> |

- F. Education Services Coordinator, Michelle Perkins, presented information on the History/Social Science curriculum pilot and adoption recommendations. Mrs. Perkins shared the timelines of the pilot and adoption, along with the committee’s recommendations. Adoption on the curriculum will come before the board at the May 9th meeting.
- G. There were no requests to speak to the Board.
- H. It was moved by Member Ellenson and seconded by Vice President Hoefler Moir to designate all Items of Business to the consent agenda with the exception of Items 2.2 and 4.7. The motion carried unanimously to designate Items of Business 2.1, 3.1, 3.2, 4.1, 4.2, 4.3, 4.4, 4.5, 4.6, 5.1, 5.2, 5.3, 5.4, and 5.5 to the consent agenda.
 - 1.1 It was moved by Vice President Hoefler Moir and seconded by Clerk Bennett to adopt the following items of business:
 - 1.2 There was no discussion on items.

History/Social Science Presentation
 Public Comments
 Consent Agenda
 Items of Business
 Discussion

SUPERINTENDENT

- 2.1 A motion to adopt the minutes of the regular board meeting of March 14, 2024, and the special board meeting of March 18, 2024.

Adopt Minutes

HUMAN RESOURCES

- 3.1 A motion to approve/ratify Personnel Assignment Order 2024-11.
- 3.2 A motion to adopt 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.

Adopt PAO
 Adopt Classified Layoff Resolution

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.
- 4.2 A motion to approve 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 A motion to 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.
- 4.4 A motion to approve the 2022-23 Bond Annual Audit Report by Wilkinson Hadley King & Co. LLP..

Approve Monthly Reports
 Approve Annual Contracts
 Adopt CalSTRS Resolution
 Approve Bond Audit Report

H. BUSINESS SERVICES (CONTINUED)

- | | | |
|-----|---|-----------------------|
| 4.5 | A motion to approve a Memorandum of Understanding with California School Employees Association and its Chapter 240 for the 2024-25 work calendar. | Approve MoU with CSEA |
| 4.6 | A motion to deny a Claim Against the District for alleged windshield damage. | Deny Claim |

BOARD POLICIES, ADMINISTRATIVE REGULATIONS AND/OR EXHIBITS

- | | | |
|-----|---|--------------------|
| 5.1 | A motion to adopt Administrative Regulation 4161.2/4261.2/4361.2: Personal Leaves. | Adopt AR 4161.2 |
| 5.2 | A motion to adopt Administrative Regulation 4161.8/4261.8/4361.8: Family Care and Medical Leave. | Adopt AR 4161.8 |
| 5.3 | A motion to adopt Board Policy 5131.9: Academic Honesty. | Adopt BP 5131.9 |
| 5.4 | A motion to adopt Administrative Regulation and Exhibit 5145.71: Title IX Sexual Harassment Complaint Procedures. | Adopt AR/E 5145.71 |
| 5.5 | A motion to adopt a number change to Board Policy 1270: Public Art to now be 1270.5. | Adopt BP 1270.5 |

Motion carried unanimously 5:0 (Ayes: Bennett, Ellenson, Hayes, Hoefler Moir, Kasper).

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|-----|--|-------------------------------------|
| 2.2 | <u>It was moved by</u> Vice President Hoefler Moir and seconded by President Hayes to adopt 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. Vice President Hoefler Moir commented that our teachers do so much for their students. Motion carried unanimously 5:0 (<u>Ayes</u> : Bennett, Ellenson, Hayes, Hoefler Moir, Kasper). | Adopt Day of the Teacher Resolution |
| 4.7 | <u>It was approved by</u> President Hayes and seconded by Member Kasper to accept 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. Motion carried unanimously 5:0 (<u>Ayes</u> : Bennett, Ellenson, Hayes, Hoefler Moir, Kasper). | Accept Gifts to the District |

- | | | |
|----|--|---------------------|
| I. | 1. There were no comments on the Enrollment Report for Month 7 from February 5 – March 1, 2024. | Enrollment Report |
| | 2. <u>Legislative updates</u> : President Hayes commented that the policy committee deadlines are coming soon and a lot of legislation will be going to the floor for adoption. A few that he discussed were SB 1414 (sex trafficking of children); SB 1435 (content in curriculum); SB 1203 (education flex accounts); and AB 2222 (student financial aid). | Legislative Updates |
| | 3. <i>First reading</i> of Board Policy and Administrative Regulation 0460: Local Control and Accountability Plan. This will come back next month for adoption. | BP/AR 0460 |
| | 4. <i>First reading</i> of Board Policy and Administrative Regulation 1312.3: Uniform Complaint Procedures. This will come back for a second reading. | BP/AR 1312.3 |
| | 5. <i>First reading</i> of Administrative Regulation 3311: Bids. This will come back next month for adoption. | AR 3311 |

I. DISCUSSION (CONTINUED)

- | | | |
|--------|---|--|
| 6. | <i>First reading</i> of Board Policy and Administrative Regulation 3400: Management of District Assets/Accounts. This will come back next month for adoption. | BP/AR 3400 |
| 7. | <i>First reading</i> of Board Policy and Administrative Regulation 4112.2: Certification. This will come back next month for adoption. | BP/AR 4112.2 |
| 8. | <i>First reading</i> of Board Policy 4154/4254/4354: Health and Welfare Benefits. This will come back next month for adoption. | BP 4154 |
| J. 1A. | Kerry Strong, LTA President, reported out through President Hayes the following: She hopes everyone enjoyed spring break! Our teachers have been busy these last few days-kicking off the first day back with a solar eclipse! Big shout out to all the staff who provided safe viewing opportunities to students. We love when science plays out in real life events for our students- a great teachable moment. Our union also awarded grants to send several LTA teachers to professional development conferences- the New Educators Conference and the Good Teaching Conference. These conferences offer outstanding PD in a wide range of content areas so teachers can attend workshops on the topics that impact their classrooms the most. Some San Diego county locals don't send any members and I'm so proud that LTA regularly sends teachers and has teachers apply to go to the professional conferences. | LTA President |
| 1B. | David Myers, CSEA President, was not present. | CSEA President |
| 2A. | Lisa Davis, Assistant Superintendent, discussed the upcoming Spring audit where site visits will focus on attendance. The business office is gearing up for the end of the year and they have provided the deadlines to staff. The maintenance department has a bid out for security fencing at Tierra del Sol Middle School. The ESS buildings that were recently purchased with ELOP dollars are in the process, as well as the new Technology building. Todd Owens is concerned that construction companies aren't picking up small projects. The ESS Spring break was full and went very well. The child nutrition central kitchen project is complete and came in on time. We will be bringing a contract for a phone system upgrade. The system we have now is 5-6 years past its end of life. | Assistant Superintendent
Lisa Davis |
| 2B. | Dr. Natalie Winspear, Assistant Superintendent, discussed the district-wide PLC meeting #4 coming up. This is where grade level teams come together. Teachers will be collaborating on math instruction. The ELCAP testing is almost complete and we begin CAASPP testing begins this month through May. She gave an overview of the human trafficking work we've done this year with staff, parents and students. We began our canine detection program with a school wide assembly. The dogs will visit the middle schools randomly throughout the year. | Assistant Superintendent
Dr. Winspear |
| 2C. | Dr. Rhonda Taylor, Superintendent, complimented her incredible team. She commented on the work we've done with human trafficking, more than most districts. She thanked the board for approving the contract with Cook Media. They are on top of our needs. She shared a video spotlighting our MTO team! | Superintendent
Dr. Taylor |
| K. | President Hayes asked if there was any further business to come before the board. There being none, the president declared the regular board meeting adjourned at 7:06 p.m. | Adjournment |

Lakeside Union School District
Board of Trustees Regular Meeting
April 11, 2024

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

Jim Bennett
Clerk of the Board

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: 5/9/24

Agenda Item:

Classified Employees Week Resolution #2024-24

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

Resolution #2024-24, recognizing and honoring the classified employees for their caring and incalculable contributions to the children of Lakeside.

Fiscal Impact (Cost):

N/A

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: Click here to enter text. |
| <input checked="" type="checkbox"/> Adoption | |
-

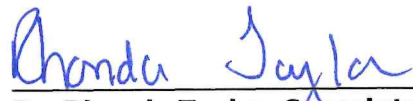
Originating Department/School: Superintendent's Office

Submitted/Recommended By:

Approved for Submission to the Governing Board:



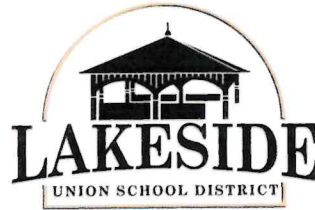
Lisa DeRosier, Executive Assistant



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

RESOLUTION 2024-24
CLASSIFIED EMPLOYEES- WEEK
MAY 19-25, 2024

WHEREAS classified employees serve the children of Lakeside through their week at the Lakeside Union School District; and

WHEREAS classified employees assist the Lakeside Union School District in it's commitment to provide quality educational programs and services to the children, youth, and adults of Lakeside; and

WHEREAS classified employees, individually and collectively set an exemplary standard of performance and commitment; and

WHEREAS classified employees provide knowledge, skills, and expertise that are relied upon throughout the organization; and

WHEREAS classified employees deserve rightful recognition and public celebration of their caring, their deeds, and their incalculable contributions to the children of the Lakeside Union School District; Now, therefore, be it

RESOLVED, that the Lakeside Union School District Board of Education hereby expresses their gratitude and commends all classified school employees for their service to the Lakeside Union School District and joins the California State Legislature in designating the week of May 19-25, 2024, as **Classified School Employees Week**.

PASSED AND ADOPTED this 9th day of May 2024 by the Governing Board of the Lakeside Union School District of San Diego County, California.

Andrew Hayes, President

Autumn Ellenson, Member

Lara Hoefler Moir, Vice President

Ron Kasper, Member

Jim Bennett, Clerk

Rhonda L. Taylor, Ed.D.
Superintendent

Igniting Passion in Today's Students for Tomorrow's Opportunities!

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: 5/9/24

Agenda Item:

Adoption of Resolution No. 2024-26

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

Parent Bill of Rights, ensuring parents have the knowledge of their rights in regards to the children's education.

Fiscal Impact (Cost):

N/A

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: Click here to enter text. |
| <input checked="" type="checkbox"/> Adoption | |

Originating Department/School: Board

Submitted/Recommended By:

Approved for Submission to the Governing Board:


Lisa DeRosier, Executive Assistant

Dr. Rhonda Taylor, Superintendent

Resolution 2024-26

Parent's Bill of Rights

Whereas, in recent years the California Governor & California State Legislature has imposed political and social agendas upon California families through intrusive legislative mandates on local school boards, and;

Whereas, many of these State mandates require or allow principals, teachers, nurses, and counselors to take actions which affect children's health, safety, emotional welfare, and the quality of their education, without any notification of parents, and;

Whereas, parents and guardians have the right to know the specific curriculum and/or books and materials used in educating their children, many of which can be disturbing, violent, use offensive language or advocate for controversial topics.

Whereas, recent State mandates create scenarios where parents or guardians may not be informed, nor allowed to give prior approval to any administration of over the counter, and prescription pharmaceuticals, nor may not be made aware of referrals of their children to physicians, mental health, counselors, or other outpatient medical services.

Whereas, the number one priority of the Lakeside Union School District Board is to ensure the physical and mental health and safety of its students, and;

Whereas, the primary purpose of the Lakeside Union School District (LUSD) Board is to ensure that its students receive the highest quality of education, and;

Whereas, the Lakeside Union School District (LUSD) Board maintains that a primary way to ensure that students receive the best possible education is to retain the highest quality educators and district staff, and;

Whereas, the Lakeside Union School District (LUSD) Board believes that in addition to focusing on the critical disciplines of reading, math, English, history and civics, it is vital to offer a variety of programs including arts, music, athletics, career technical education, and;

Whereas, the Lakeside Union School District (LUSD) Board resolves that the most important factor in protecting the health, safety and ensuring the academic success of its students is to guarantee that parents and guardians are able to play an active role in students education, and;

Whereas, in order for parents and guardians to actively participate in student's education, a clear delineation of parents and guardian's rights must be assured;

Now therefore be it resolved:

The Lakeside Union School District Board of Trustees approves the following.

A Parent's (and Guardians) Bill of Rights. A Parent's Bill of Rights to include the following areas:

- Curriculum. Public listing and disclosure of all curricula.
- Parent advisory committees to review and make recommendations regarding parental notification, student privacy matters, selection and implementation of curriculum and supplemental instructional materials.
- Detailing of age-appropriateness of library books, ensuring parents ability to restrict their child's access to objectionable books.
- Parent's ability to "opt out" of what they deem to be inappropriate topics including sex education.
- Notification of official or unofficial district actions related to bullying, suicidal intent, sexual transitioning, academic achievement.

- Parental notification of state mandated or district-initiated modifications to restroom and locker room facilities which impact children's privacy.
- Parental written approval for administering all medications or medical treatments from cold medicines to insulin.

Be it further resolved that the Lakeside Union School District Board of Trustees directs district administrative staff to bring for review existing board policies and administrative regulations pertaining to the Parent's Bill of Rights no later than June 30th, 2024.

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: 5/9/24

Agenda Item:

School and Employee Calendar

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

Adoption of the revised 2024-2025 school and employee calendar with minor changes to the report card distribution dates.

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

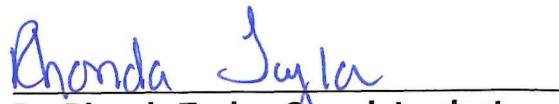
Originating Department/School: Superintendent's Office

Submitted/Recommended By:

Approved for Submission to the Governing Board:



Lisa DeRosier, Executive Assistant



Dr. Rhonda Taylor, Superintendent

LAKESIDE UNION SCHOOL DISTRICT

2024-2025 Calendar



S	M	T	W	T	F	S
JULY 2024						
	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			

S	M	T	W	T	F	S
AUGUST 2024						
10					1	2
					3	
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25	26	27	28	29	30	

S	M	T	W	T	F	S
SEPTEMBER 2024						
20						
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29	30					

S	M	T	W	T	F	S
OCTOBER 2024						
23						
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NOVEMBER 2024						
14						
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24	25	26	27	28	29	30

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DECEMBER 2024						
15						
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29	30	31				

S	M	T	W	T	F	S
JANUARY 2025						
18						
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FEBRUARY 2025						
18						
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MARCH 2025						
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S	M	T	W	T	F	S
APRIL 2025						
11						
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27	28	29	30			

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MAY 2025						
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25	26	27	28	29	30	31

S	M	T	W	T	F	S
JUNE 2025						
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15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

SPECIAL DAYS

- Non-Student Day
- First Day of School** August 19
- Last Day of School** June 12
- 100th Day January 30

GRADING PERIODS

- Trimester Grading Periods
- 1st (58 Days) November 8, 2024
- 2nd (60 Days) February 28, 2025
- 3rd (62 Days) June 12, 2025

REPORT CARDS

- Trimester 1.. November 15-22, 2024
- Trimester 2 March 7-14, 2025
- Trimester 3 June 12-13, 2025

PARENT CONFERENCES

- Parent Conferences for Elementary and Middle Schools
- October 8-11, 2024
- At-Promise Parent Conferences for Elementary Only
- December 12-13, 2024
- At-Promise Parent Conferences for Elementary Only
- March 13-14, 2025

LAKESIDE UNION SCHOOL DISTRICT

Month 1	August 19 – September 13, 2024	19 days
Month 2	September 16 – October 11, 2024	20 days
Month 3	October 14 – November 8, 2024	19 days
Month 4	November 11 – December 6, 2024	14 days
Month 5	December 9, 2024 – January 3, 2025	10 days
Month 6	January 6 – January 31, 2025	18 days
Month 7	February 3 – February 28, 2025	18 days
Month 8	March 3 – March 28, 2025	20 days
Month 9	March 31 – April 25, 2025	9 days
Month 10	April 28 – May 23, 2025	20 days
Month 11	May 26 – June 12, 2025	13 days

2024

July 4	Thursday	Fourth of July (Legal Holiday)
July 29	Monday	Middle School Principals Return
July 30	Tuesday	11-Month Employees Return
August 5	Monday	Site Administrators Return
August 5	Monday	10-Month Clerical Employees Return
August 14	Wednesday	Teacher Workday
August 15*	Thursday	Professional Development
August 16	Friday	Teacher Workday
August 19	Monday	Classes Begin
September 2	Monday	Labor Day (Legal Holiday)
September 27	Friday	School Site Goal Setting and Planning Day (Minimum Day)
October 8-11	Monday-Friday	Elem & Middle School Parent Conferences (Minimum Day)
November 1	Friday	Non Student, Non Staff Day
November 11	Monday	Veterans Day (Legal Holiday)
November 25-29	Monday-Friday	Thanksgiving Holidays (Student and Legal Holidays)
December 12-13	Thursday-Friday	At-Promise Elementary Parent Conferences (Minimum Day)
Dec 23-Jan 3	Monday-Friday	Winter Recess
December 24	Tuesday	Local Holiday
December 25	Wednesday	Christmas Day (Legal Holiday)
December 26	Thursday	Local Holiday **

2025

January 1	Wednesday	New Year's Day (Legal Holiday)
January 2	Thursday	Local Holiday
January 20	Monday	Martin Luther King, Jr. Day (Legal Holiday)
January 31*	Friday	Professional Development Day (Student Holiday)
February 10	Monday	Lincoln's Day (Legal Holiday)
February 17	Monday	Washington's Day (Legal Holiday)
March 13-14	Thursday-Friday	At-Promise Elementary Parent Conferences (Minimum Day)
April 7-21	Monday-Monday	Spring Recess
April 18	Friday	Good Friday (Local Holiday)
May 7	Wednesday	Day of the Teacher
May 19-23	Monday-Friday	Classified Employees Week
May 23	Friday	School Site Goal Setting and Planning Day (Minimum Day)
May 26	Monday	Memorial Day (Legal Holiday)
June 12	Thursday	Last Day of Student Attendance/Final Workday for Teachers
June 19	Thursday	Juneteenth Holiday
June 25	Wednesday	Final Workday for 10-month Clerical Employees
June 27	Friday	Final Workday for Administrators
June 27	Friday	Final Workday for 11-Month Employees

**Professional Development Day*

***Local holiday for employees, December 26, 2024, in lieu of Admissions Day*

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: 5/9/24

Agenda Item:

Personnel Assignment Order 2024-12

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

Originating Department/School: Human Resources

Submitted/Recommended By:

Approved for Submission to the Governing Board:

Christine Sinatra, HR Exec Director


Dr. Rhonda Taylor, Superintendent

**LAKESIDE UNION SCHOOL DISTRICT
BOARD OF TRUSTEES BOARD MEETING, May 9, 2024
Personnel Assignment Order – 2024-12**

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
Wu, Ping	Teacher/TDS	F/16		\$106,645	4/22/2024

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
Vasquez-Ruvalcaba, Melissa	Teacher/RV	D/2	Personal	6/12/2024
Jennings, Jessica	RSP Teacher/LC	D/3	Personal	4/30/2024
Trattner, AnaVeronica	Teacher/WG	F/11	Personal	6/12/2024
Smith, Peter	Teacher/LP	A/2	Personal	6/12/2024

E. Provisional Internship Permit:

Employee	Assignment/Location	Effective Date

F. LAO:

Employee	Location	Position	Reason	Effective Date
Rocha, Rocio	RV	Teacher	Personal/Family Oriented	2024/2025 School Year

G. Reduction of FTE:

Employee	Location	Position	Effective Date	Recommendation
Perkins, Michelle	District Office	Coordinator, Education Services	07/01/2024	Yes

Classified Staff

H. New Hire:

Employee	Location	Position/Class/Step	Previous Monthly Salary	New Monthly Salary	Effective Date
Amiri, Sharifa	TDS	Child Nutrition Assistant/8/1	N/A	\$641.45	5/1/2024
Billings, Brenda	LMS	IA-I-SPED/10/7	N/A	\$1,584.06	5/1/2024
Blaisdell, Christine	Child Nutrition	Child Nutrition Assistant/8/3	N/A	\$691.45	5/1/2024
Dotterman, Noah	Lemon Crest	Custodian Night/17/3	N/A	\$3,416.00	5/1/2024
McFall, Celeste	LEAPP	IA-Preschool/9/7	N/A	\$1,375.00	5/1/2024
Toups, Tommie	LEAPP	IA-III-SPED/14/3	N/A	\$1,115.95	5/1/2024

I. Change of Status/Location:

Employee	Location	Position/Class/Step	Previous Monthly Salary	New Monthly Salary	Effective Date
Myers, Jaimi	District Office		\$6,189.16	\$5,430.90	4/16/2024
Olivas, Dee Dee	District Office	BIA/17/7	\$4,936.58	\$2,783.93	4/16/2024

J. Management Position:

Employee	Location	Position/Range/Step	Effective Date

K. Resignation/Termination:

Employee	Location	Position	Reason	Effective Date
Bishop, Lourissa	ESS	Child Dev Assistant	N/A	4/30/2024
Figueroa, Freddie	Transportation	Bus Driver	Probation Release	4/27/2024
Guerrero, Marissa	Child Nutrition	Child Nutrition Assistant	N/A	4/13/2024
Joyce, Richard	Maintenance	Skilled Maint Worker Plumber	Salary	4/24/2024

L. Leave (FMLA):

Employee Name	Location	Position	Effective Date
Kohmuench, Paul	Lindo Park	Campus Supervisor	5/1/2024-6/12/2024

M. Short Term Staff Agreement

Employee	Title	Start/End Date	Job Duties	Hourly Rate

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

Governing Board Meeting Date: MAY 9, 2024

Agenda Item:

COMMERCIAL WARRANT LISTING SHEET – for the period 04/01/2024 THRU 04/30/2024

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):

\$ 1,780,803.51

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


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 04/01/2024 - 04/30/2024

Fund	Warrant ID	Vendor Name	Payment Date	Invoice Item Description	Amount Charged to Fund
0100	021057	COAST MUSIC THERAPY INC.	4/8/2024	SPED SERVICES	500.00
0100	021512	AMERICAN FIDELITY ADMIN. SERVICES, LLC	4/22/2024	ACA Reporting Services	1,294.20
0100	021670	CURRIER & HUDSON	4/24/2024	HR Legal Fees	35,745.43
0100	14133973	OFFICE DEPOT, INC.	4/1/2024	OFFICE SUPPLIES	61.36
0100	14133974	T-MOBILE	4/1/2024	District HotSpots	1,640.00
0100	14134738	ASCEND SERVICES, INC.	4/4/2024	SPED SERVICES	26,962.00
0100	14134739	ASCD	4/4/2024	ASCD RENEWALS	393.42
0100	14134741	HEINEMANN	4/4/2024	SUPPLIES	124.95
0100	14134742	HELIX WATER DISTRICT	4/4/2024	WATER	1,894.67
0100	14134743	McGRAW-HILL SCHOOL EDUCATION HOLDINGS	4/4/2024	CURRICULUM	39,510.68
0100	14134744	PAR, INC.	4/4/2024	FAR EXAMINER RECORD	666.82
0100	14134745	SMIRTHWAITE USA LLC	4/4/2024	SUPPLIES	264.00
0100	14134746	SOLIAN HEALTH LLC	4/4/2024	SPED SERVICES	2,088.00
0100	14134747	SCHOOL PSYCH AI	4/4/2024	PSYCH ASSESSMENTS	1,100.00
0100	14134748	THE STEPPING STONES GROUP, LLC	4/4/2024	SPED SERVICES	1,986.37
0100	14134749	TOTAL VISION PC, INC.	4/4/2024	SPED SERVICES	760.00
0100	14134750	VERBAL BEHAVIOR ASSOCIATES, INC.	4/4/2024	SPED SERVICES	1,137.49
0100	14136094	DAVE & BUSTERS of CALIFORNIA, Inc.	4/8/2024	ESS CAMP	6,785.11
0100	14136095	JAMIE LINDSAY	4/8/2024	Para Educator Conference	232.82
0100	14136096	PETER PIPER PIZZA	4/8/2024	ESS CAMP	3,904.09
0100	14137301	NINYO & MOORE	4/11/2024	Central Kitchen Inspection	624.00
0100	14137302	PETER PIPER PIZZA	4/11/2024	ESS CAMP	3,278.91
0100	14137303	VICTORY KOREDREY	4/11/2024	ESS CAMP	6,005.25
0100	14138879	ASELTINE SCHOOL	4/15/2024	TUITION	19,404.67
0100	14138881	IMAGINE LEARNING, LLC	4/15/2024	EL LANGUAGE ARTS STUDENT SINGL	5,769.26
0100	14138882	INSTITUTE FOR EFFECTIVE EDUCATION	4/15/2024	TUITION	16,041.50
0100	14138883	KYOCERA DOCUMENT SOLUTIONS WEST, LLC	4/15/2024	COPIER LEASE AND COPIES	1,225.75
0100	14138885	SPECIALIZED EDUCATION OF CALIFORNIA, INC	4/15/2024	SPED SERVICES	7,927.48
0100	14138886	SMART & FINAL ACCT #398869	4/15/2024	SUPPLIES	315.20
0100	14138890	WELLS FARGO VENDOR FINANCIAL SERVICES	4/15/2024	COPIER LEASE AND COPIES	158.41
0100	14140048	CARDBOARD TECK LLC	4/18/2024	PRINTING	1,205.60
0100	14140049	ATKINSON, ANDELSON, LOYA, RUUD AND ROMO	4/18/2024	LEGAL FEES	1,829.00
0100	14140050	AAA WATER TENDER	4/18/2024	M&O Parts/Supplies	17.12
0100	14140051	LANGUAGE TESTING INTERNATIONAL, INC.	4/18/2024	AAPPL IMMERSION ASSESSMENT	205.00
0100	14140052	AGRICULTURAL PEST CONTROL	4/18/2024	M&O Parts/Supplies	1,380.00

BOARD WARRANT REPORT 04/01/2024 - 04/30/2024

Fund	Warrant ID	Vendor Name	Payment Date	Invoice Item Description	Amount Charged to Fund
0100	14140053	ALBERTSONS	4/18/2024	SUPPLIES	209.03
0100	14140054	dba ALL FOUR STRINGS	4/18/2024	INSTRUMENTS	2,606.64
0100	14140055	AT&T	4/18/2024	PHONE SERVICE	2,856.19
0100	14140056	A-Z BUS SALES INC.	4/18/2024	TRANS SPED Supplies	86.91
0100	14140059	BLUE COAST CONSULTING	4/18/2024	Kitchen DSA Inspection	5,060.00
0100	14140060	BEST VALUE GLASS	4/18/2024	Maintenance Supplies	53.88
0100	14140062	STEPHANIE BISHOP	4/18/2024	CONFERENCE	225.45
0100	14140063	BERTRANDS MUSIC ENTERPRISES INC	4/18/2024	INSTRUMENT REPAIRS	1,166.12
0100	14140064	RON COOK	4/18/2024	VIDEO .	1,450.00
0100	14140066	COUNTY OF SCHOOLS SERVICE FUND	4/18/2024	TRAINING	370.00
0100	14140068	DATEL SYSTEMS INCORPORATED	4/18/2024	TECH	770.41
0100	14140069	DEPARTMENT OF JUSTICE	4/18/2024	HR Fingerprinting	228.00
0100	14140071	CAL PACIFIC TRUCK CENTER, LLC	4/18/2024	MOT SERVICE REPAIR	561.38
0100	14140072	DION & SONS, INC.	4/18/2024	FUEL	7,740.07
0100	14140073	EAST COUNTY ALIGNMENT	4/18/2024	MOT SERVICE REPAIR	361.64
0100	14140074	EDCO DISPOSAL CORPORATION	4/18/2024	DISPOSAL SERVICE	7,706.59
0100	14140075	EL CAJON FORD	4/18/2024	M&O Parts/Supplies	1,073.04
0100	14140076	REECE PLUMBING	4/18/2024	MOT SUPPLIES	833.75
0100	14140077	EYE PHONE CITY	4/18/2024	TECH SERVICE REPAIR	1,007.39
0100	14140078	FONDA TRIPP	4/18/2024	CONFERENCE	421.80
0100	14140079	MICHELLE FURMAN, M.S., P.T	4/18/2024	Physical Therapy Services	2,369.00
0100	14140081	GLOBAL VENDING GROUP, INC.	4/18/2024	PTSA BOOK VENDING MACHINE	6,840.00
0100	14140083	HOME DEPOT CREDIT SERVICES	4/18/2024	SUPPLIES	1,905.40
0100	14140084	HYDROTEX	4/18/2024	DIESEL ADDITIVE TO REDUCE EMIS	513.37
0100	14140085	IMPERIAL SPRINKLER SUPPLY, INC.	4/18/2024	MOT SUPPLIES	55.74
0100	14140086	KYOCERA DOCUMENT SOLUTIONS WEST, LLC	4/18/2024	COPIER LEASE AND COPIES	6,881.65
0100	14140088	LAKESIDE WATER DISTRICT	4/18/2024	WATER	1,857.43
0100	14140089	AMBER LARSON	4/18/2024	CONFERENCE	225.45
0100	14140090	LITERATI, INC	4/18/2024	LITERATI BOOK FAIR	3,378.93
0100	14140092	JOCELYN MCCULLOUGH	4/18/2024	MILEAGE REIMBURSEMENT	1,037.16
0100	14140094	MISSION FEDERAL CREDIT UNION	4/18/2024	P CARD	23,539.40
0100	14140095	NATIONAL PETROLEUM INC	4/18/2024	MOT SUPPLIES	2,468.83
0100	14140096	OFFICE DEPOT, INC.	4/18/2024	SUPPLIES	283.73
0100	14140097	ONE-ROOM SCHOOLHOUSE TUTORING	4/18/2024	SPED SERVICES	270.00
0100	14140098	PAYTON'S TRUE VALUE HARDWARE	4/18/2024	SUPPLIES	1,093.56

BOARD WARRANT REPORT 04/01/2024 - 04/30/2024

Fund	Warrant ID	Vendor Name	Payment Date	Invoice Item Description	Amount Charged to Fund
0100	14140099	NCS PEARSON, INC	4/18/2024	SPED SUPPLIES	1,024.35
0100	14140100	CHRISTINE POJAS	4/18/2024	CONFERENCE	225.45
0100	14140101	RAYNE OF SAN DIEGO	4/18/2024	WATER SERVICES	111.00
0100	14140102	SAN DIEGO COUNTY OFFICE OF ED	4/18/2024	TRAINING	618.00
0100	14140103	SAN DIEGO GAS & ELECTRIC	4/18/2024	GAS AND ELECTRIC	58,543.32
0100	14140104	S&S WORLDWIDE	4/18/2024	SUPPLIES	499.40
0100	14140105	SCHOOL BUS PARTS CO.	4/18/2024	MOT SUPPLIES	54.64
0100	14140106	SHRED IT	4/18/2024	SHREDDING SERVICES	268.80
0100	14140107	SITEONE LANDSCAPE SUPPLY HOLDING, LLC	4/18/2024	MOT SUPPLIES	180.32
0100	14140108	SMART & FINAL ACCT #398869	4/18/2024	SUPPLIES	872.02
0100	14140109	SNA	4/18/2024	CONFERENCE	2,390.00
0100	14140111	TELACU CONSTRUCTION MANAGEMENT, INC	4/18/2024	CONSTRUCTION	28,280.00
0100	14140112	BORDER RECAPING, LLC	4/18/2024	MOT SUPPLIES	673.86
0100	14140113	TOTAL VISION PC, INC.	4/18/2024	SPED SERVICES	950.00
0100	14140114	VERBAL BEHAVIOR ASSOCIATES, INC.	4/18/2024	SPED SERVICES	23,547.80
0100	14140115	VERIZON WIRELESS	4/18/2024	CELL SERVICES	2,254.05
0100	14140116	WAXIE SANITARY SUPPLY	4/18/2024	Custodial Supplies	1,784.85
0100	14140117	WEBB'S RV SUPPLY	4/18/2024	Maintenance Supplies	24.65
0100	14140118	WELLS FARGO VENDOR FINANCIAL SERVICES	4/18/2024	COPIER LEASE	393.31
0100	14140119	WESTED	4/18/2024	SUPPLIES	3,071.20
0100	14141574	AG PARTS WORLDWIDE, INC.	4/22/2024	MOT SUPPLIES	162.57
0100	14141575	ALBERTSONS	4/22/2024	SUPPLIES	47.20
0100	14141576	ALLIED REFRIGERATION INC	4/22/2024	M&O Parts/Supplies	95.92
0100	14141577	APPLE INC.	4/22/2024	COMPUTER FOR THEATER	2,115.82
0100	14141578	CED-SAN DIEGO CONSOLIDATED ELECTRIC	4/22/2024	M&O Parts/Supplies	64.65
0100	14141579	California Dept of Tax and Fee	4/22/2024	SALES AND USE TAX	1,180.50
0100	14141580	California Dept of Tax and Fee	4/22/2024	DIESEL TAX	23.00
0100	14141581	CYT	4/22/2024	1ST GRADE-MATILDA	1,200.00
0100	14141582	DELANEY EDUC. ENT., INC.	4/22/2024	VARIOUS BOOKS	1,249.04
0100	14141584	IMPERIAL SPRINKLER SUPPLY, INC.	4/22/2024	MOT SUPPLIES	17.78
0100	14141585	SAFETY-KLEEN SYSTEMS, INC.	4/22/2024	MOT SUPPLIES	166.00
0100	14141586	SMART & FINAL ACCT #398869	4/22/2024	SUPPLIES	333.39
0100	14141587	SPARKLETTS	4/22/2024	WATER SERVICE	364.71
0100	14141588	ZOOLOGICAL SOCIETY	4/22/2024	ESS CAMP	13,720.00
0100	14142666	Susan A Klein	4/25/2024	REIMBURSEMENT	75.41

BOARD WARRANT REPORT 04/01/2024 - 04/30/2024

Fund	Warrant ID	Vendor Name	Payment Date	Invoice Item Description	Amount Charged to Fund
0100	14142667	AIRGAS USA, LLC	4/25/2024	M&O Parts/Supplies	178.81
0100	14142668	ALBERTSONS	4/25/2024	SUPPLIES	205.88
0100	14142669	ALLIANCE FOR AFRICAN ASSISTANCE	4/25/2024	TRANSLATION SERVICES	1,133.21
0100	14142670	AMAZON CAPITAL SERVICES, INC.	4/25/2024	SUPPLIES	1,463.02
0100	14142672	AZTEC FIRE & SAFETY INC.	4/25/2024	ANNUAL INSPECTIONS	3,205.00
0100	14142673	AZUMA TECH SYSTEMS INC.	4/25/2024	MOT SERVICES	190.00
0100	14142674	ELIZABETH HARDING	4/25/2024	REIMBURSEMENT	77.93
0100	14142676	CATHERINE ANDREWS	4/25/2024	REIMBURSEMENT	47.72
0100	14142677	CINTAS CORPORATION	4/25/2024	UNIFORMS	1,073.84
0100	14142678	COUNTY OF SAN DIEGO, DEH	4/25/2024	DEHQ FACILITY PERMIT	1,180.00
0100	14142679	GRACE COX	4/25/2024	REIMBURSEMENT	119.88
0100	14142680	DEBORAH ANN COMISKEY	4/25/2024	REIMBURSEMENT	117.31
0100	14142681	DAVIS FARMS	4/25/2024	AVOCADOS	2,768.50
0100	14142682	DIXIELINE	4/25/2024	MOT SUPPLIES	2,182.32
0100	14142683	3 CHORDS/EPIC SPECIAL EDUCATION STAFFING	4/25/2024	SPED SERVICES	17,600.00
0100	14142684	FONDA TRIPP	4/25/2024	REIMBURSEMENT	403.00
0100	14142686	HELPING OUR WAY	4/25/2024	KINDER CATERPILLAR CHOW ASSEMB	600.00
0100	14142687	DAVINEE HUDEN	4/25/2024	REIMBURSEMENT	55.34
0100	14142688	JASON JUSTESON	4/25/2024	REIMBURSEMENT	460.30
0100	14142689	Jennifer Collado-Perez	4/25/2024	MILEAGE REIMBURSEMENT	702.16
0100	14142690	K F Enterprises	4/25/2024	COWBOY KEN ASSEMBLY	600.00
0100	14142691	KHEYSTEN SEUFERER	4/25/2024	REIMBURSEMENT	33.77
0100	14142692	KRISTEN MARIE EVELAND	4/25/2024	CGI DEVELOPMENT	900.00
0100	14142693	KYOCERA DOCUMENT SOLUTIONS WEST, LLC	4/25/2024	COPIER LEASE AND COPIES	401.27
0100	14142695	LAKESIDE WATER DISTRICT	4/25/2024	WATER	585.31
0100	14142696	LEADER SERVICES	4/25/2024	SPED Medi-Cal Reporting	835.60
0100	14142697	KATHRYN MARTIN	4/25/2024	REIMBURSEMENT	142.21
0100	14142698	CASEY MCNELLEN	4/25/2024	REIMBURSEMENT	24.24
0100	14142699	MISSION IMPRINTABLES, INC	4/25/2024	SUPPLIES	2,105.87
0100	14142701	AMANDA NELSON	4/25/2024	REIMBURSEMENT	26.47
0100	14142702	NEW HAVEN YOUTH AND FAMILY SERVICES	4/25/2024	SPED SERVICES	2,200.00
0100	14142703	OFFICE DEPOT, INC.	4/25/2024	SUPPLIES	121.72
0100	14142704	OREILLY AUTO PARTS	4/25/2024	MOT SUPPLIES	2,468.48
0100	14142707	PEPSI-COLA	4/25/2024	SUPPLIES	351.82
0100	14142708	RAYO WHOLESALE	4/25/2024	MOT SUPPLIES	150.38

BOARD WARRANT REPORT 04/01/2024 - 04/30/2024

Fund	Warrant ID	Vendor Name	Payment Date	Invoice Item Description	Amount Charged to Fund
0100	14142709	SAMANTHA ORAHOOD	4/25/2024	CONFERENCE	347.62
0100	14142710	SCHOOL SPECIALTY, INC	4/25/2024	SUPPLIES	2,230.23
0100	14142711	SCHOOL FACILITY CONSULTANTS	4/25/2024	Modernization Consultant	3,012.50
0100	14142712	SMART & FINAL	4/25/2024	SUPPLIES	482.02
0100	14142713	SPECIALIZED THERAPY SERVICES	4/25/2024	PT/AT Services	1,749.85
0100	14142714	SUNBELT STAFFING	4/25/2024	SPED SERVICES	11,385.00
0100	14142715	JODI STEIN	4/25/2024	REIMBURSEMENT	30.99
0100	14142716	STS EDUCATION	4/25/2024	CHROMEBOOKS	392,540.13
0100	14142717	SYCAMORE LANDFILL	4/25/2024	M&O SERVICES	4,450.44
0100	14142720	Total Compensation Systems, Inccc.	4/25/2024	GASB 75 FULL VALUATION	3,420.00
0100	14142721	THE STEPPING STONES GROUP, LLC	4/25/2024	SPED SERVICES	950.74
0100	14142722	WILMA WARD	4/25/2024	REIMBURSEMENT	251.58
0100	14142723	WELLS FARGO VENDOR FINANCIAL SERVICES	4/25/2024	COPIER LEASE	723.35
0100	14142724	KERI WUTZKE	4/25/2024	CONFERENCE	156.00
0100	14144354	AMAZON CAPITAL SERVICES, INC.	4/29/2024	SUPPLIES	296.00
0100	14144355	DANIELLE CLARK	4/29/2024	CONFERENCE	267.90
0100	14144356	FIRST STUDENT INC.	4/29/2024	STUDENT TRANSPORTATION	4,025.00
0100	14144357	ALEJANDRA GARCIA	4/29/2024	CONFERENCE	87.00
0100	14144358	JENNIFER MARTIGNETTI	4/29/2024	CONFERENCE	87.00
0100	14144359	MARIANA MESNIK	4/29/2024	SPED SERVICES	4,090.00
0100 TOTAL				GENERAL	901,824.22
0800	14141579	California Dept of Tax and Fee	4/22/2024	SALES AND USE TAX	2.97
0800	14144354	AMAZON CAPITAL SERVICES, INC.	4/29/2024	SUPPLIES	136.28
0800 TOTAL				ASB	139.25
1200	14140074	EDCO DISPOSAL CORPORATION	4/18/2024	DISPOSAL SERVICE	37.16
1200	14140087	KYOCERA DOCUMENT SOLUTIONS WEST, LLC	4/18/2024	COPIER LEASE AND COPIES	39.94
1200	14140094	MISSION FEDERAL CREDIT UNION	4/18/2024	P CARD	840.10
1200	14140103	SAN DIEGO GAS & ELECTRIC	4/18/2024	GAS AND ELECTRIC	373.24
1200	14141579	California Dept of Tax and Fee	4/22/2024	SALES AND USE TAX	2.94
1200	14141587	SPARKLETTS	4/22/2024	WATER SERVICE	38.07
1200	14142675	ROBYN BOWMAN	4/25/2024	CONFERENCE	429.00
1200	14142675	ROBYN BOWMAN	4/25/2024	REIMBURSEMENT	9.03
1200 TOTAL				CHILD DEVELOPMENT	1,769.48
1300	14138889	WAXIE SANITARY SUPPLY	4/15/2024	CN Supplies	1,004.34
1300	14140055	AT&T	4/18/2024	PHONE SERVICE	19.26

BOARD WARRANT REPORT 04/01/2024 - 04/30/2024

Fund	Warrant ID	Vendor Name	Payment Date	Invoice Item Description	Amount Charged to Fund
1300	14140058	TOSHIA BARTLEY	4/18/2024	LUNCH ACCOUNT REFUND	20.00
1300	14140065	CRISP ENTERPRISES, INC./CRISP IMAGING	4/18/2024	BANNERS	183.00
1300	14140067	CULLIGAN	4/18/2024	WATER RENTAL	58.54
1300	14140070	DESCON	4/18/2024	MURAL AND SIGNAGE	4,312.00
1300	14140072	DION & SONS, INC.	4/18/2024	CN Fuel Charges	541.37
1300	14140080	GOLD STAR FOODS INC	4/18/2024	FOOD	12,016.72
1300	14140082	HOLLANDIA DAIRY	4/18/2024	MILK	19,034.63
1300	14140087	KYOCERA DOCUMENT SOLUTIONS WEST, LLC	4/18/2024	COPIER LEASE AND COPIES	20.76
1300	14140091	MAD WRAPS	4/18/2024	TABLE WRAPS	989.14
1300	14140094	MISSION FEDERAL CREDIT UNION	4/18/2024	P CARD	677.87
1300	14140108	SMART & FINAL ACCT #398869	4/18/2024	SUPPLIES	122.83
1300	14140110	SYSCO FOODS SERVICES	4/18/2024	CN Broadline	770.18
1300	14140115	VERIZON WIRELESS	4/18/2024	CELL SERVICES	50.92
1300	14141579	California Dept of Tax and Fee	4/22/2024	SALES AND USE TAX	49.41
1300	14141583	DOMINO'S PIZZA	4/22/2024	LUNCH	46,985.46
1300	14141586	SMART & FINAL ACCT #398869	4/22/2024	SUPPLIES	74.46
1300	14141587	SPARKLETTS	4/22/2024	CN Water Service	17.36
1300	14142671	SUSAN AYALA	4/25/2024	REFUND	11.00
1300	14142677	CINTAS CORPORATION	4/25/2024	CN Services	199.62
1300	14142693	KYOCERA DOCUMENT SOLUTIONS WEST, LLC	4/25/2024	COPIER LEASE AND COPIES	3.43
1300	14142718	SYSCO FOODS SERVICES	4/25/2024	CN Broadline	854.37
1300	14142719	CHRISTY THAHELD	4/25/2024	REFUND	18.00
1300 TOTAL				CHILD NUTRITION	88,034.67
2519	020849	PACIFIC MOBILE STRUCTURES, INC.	4/2/2024	DO Trailer Rental	891.10
2519	14142700	NATIONAL CONSTRUCTION RENTALS, INC.	4/25/2024	2 Station Restroom Trailer Ren	2,015.50
2519 TOTAL				CAPITAL FACILITIES	2,906.60
4000	14134740	CLIMATEC, INC.	4/4/2024	CONSTRUCTION CONTRACTS	190,478.80
4000	14142685	GEM INDUSTRIAL	4/25/2024	Central Kitchen Contractor	543,376.96
4000 TOTAL				SPECIAL RESERVE	733,855.76
6200	14138880	Barona Band of Mission Indians	4/15/2024	BICS FUEL	241.77
6200	14138884	SCHOOLS EXCESS LIABILITY FUND	4/15/2024	INSURANCE	316.21
6200	14138888	STS EDUCATION	4/15/2024	EQUIPMENT	30,103.50
6200	14138891	WILKINSON HADLEY KING & CO LLP	4/15/2024	FINAL 2021-22 AUDIT	2,250.00
6200	14140057	MATH TRANSFORMATIONS	4/18/2024	MATH WORKSHOPS	9,200.00
6200	14141579	California Dept of Tax and Fee	4/22/2024	SALES AND USE TAX	0.05

BOARD WARRANT REPORT 04/01/2024 - 04/30/2024

Fund	Warrant ID	Vendor Name	Payment Date	Invoice Item Description	Amount Charged to Fund
6200 TOTAL				BARONA CHARTER	42,111.53
6201	14138887	SOUTHERN RECOGNITION, INC.	4/15/2024	SUPPLIES	371.46
6201	14138892	XEROX FINANCIAL SERVICES, LLC	4/15/2024	COPIER LEASE AND COPIES	1,506.60
6201	14140055	AT&T	4/18/2024	PHONE SERVICE	99.05
6201	14140061	B&H FOTO & ELECTRONICS CORP	4/18/2024	SUPPLIES	2,059.19
6201	14140074	EDCO DISPOSAL CORPORATION	4/18/2024	DISPOSAL SERVICE	284.82
6201	14140083	HOME DEPOT CREDIT SERVICES	4/18/2024	SUPPLIES	249.54
6201	14140093	McGRAW-HILL SCHOOL EDUCATION HOLDINGS	4/18/2024	SUBSCRIPTION	35.94
6201	14140103	SAN DIEGO GAS & ELECTRIC	4/18/2024	GAS AND ELECTRIC	3,357.34
6201	14140116	WAXIE SANITARY SUPPLY	4/18/2024	CLEANING SUPPLIES	337.69
6201	14140120	YOUNG, MINNEY & CORR LLP	4/18/2024	RVCSLEGAL FEES	35.00
6201	14141579	California Dept of Tax and Fee	4/22/2024	SALES AND USE TAX	27.13
6201	14141587	SPARKLETTS	4/22/2024	RVCS Water Service	291.64
6201	14142725	XEROX FINANCIAL SERVICES, LLC	4/25/2024	COPIER LEASE AND COPIES	1,506.60
6201 TOTAL				RIVER VALLEY CHARTER	10,162.00
				GRAND TOTAL	\$ 1,780,803.51

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: May 9, 2024

Agenda Item:

REVOLVING CASH FUND REGISTER

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

LISTING OF ALL TRANSACTIONS (SUPT) FOR THE MONTH PRIOR TO BOARD MEETING

Fiscal Impact (Cost):

\$ 4,013.00

Funding Source:

GENERAL FUND, DONATION ACCOUNTS, ETC.

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: Click here to enter text. |
| <input type="checkbox"/> Adoption | |

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
RCF 2324-0011

#	Date	Ck#	Name	Memo/Description	Check Amount
RCF 2324-0011	4/9/2024	40325	PREMIERE SPEAKERS BUREAU	Deposit for Keynote Speaker on 8/15/24	4,013.00
					\$ 4,013.00

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: May 9, 2024

Agenda Item:

Ratification of Purchase Orders and Change Orders Listing (April 1, to April 30, 2024)

Background (Describe 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 April 1 through April 30, 2024 is attached.

Fiscal Impact (Cost):

208,252.71

Funding Source:

General Fund Total: \$123,300.37 Student Body ASB Total: \$0.00, Child Development Total: \$0.00 Child Nutrition Total: \$84,816.34, Special Reserve Fund: \$136.00

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 | |

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 _____

APRIL 2024 PURCHASE ORDERS

PO No.	Supplier	PO Ref	Funt	Site/Dept	total by Account
0000010256	SNA	2024 ANC BOSTON REGISTRATION	0100 Child Nutrition		2,390.00
0000010259	AMAZON CAPITAL SERVICES, INC	COPEs	0100 Pupil Services		2,350.03
0000010260	FINELINE GRAFIX	FINELINE GRAFIX-SILKSCREENING	0100 ESS/ASES/PreSchool		2,000.00
0000010262	PARTS AUTHORITY LLC	TRANSPORTATION	0100 Transportation		2,000.00
0000010263	Total Compensation Systems, Inccc.	GASB 75 FULL VALUATION-1ST INS	0100 Business Services		3,420.00
0000010264	SAN DIEGO COUNTY OFFICE OF ED	BILITERACY SYMPOSIUM	0100 Superintendent		200.00
0000010265	ATKINSON, ANDELSON, LOYA, RUUD AND RON	REALTALK EXPULSIONS	0100 Pupil Services		79.00
0000010266	CYT	1ST GRADE - MATILDA	0100 Lakeside Farms		1,293.00
0000010267	COUNTY OF SCHOOLS SERVICE FUND	STUDENT RECORDS TRAINING	0100 Pupil Services		370.00
0000010269	SMART & FINAL	20023/24 SMART & FINAL - ELOP	0100 ESS/ASES/PreSchool		5,000.00
0000010270	LITERATI, INC	LF - LITERATI BOOK FAIR 2024	0100 Lakeside Farms		3,378.93
0000010271	NCS PEARSON, INC	WPPSI BUG STOCK	0100 Psychology Services		89.44
0000010272	CAJON VALLEY UNION SCHOOL DISTRICT	CAJON VALLEY INTERPURTING SERVICE	0100 Special Education		2,087.47
0000010273	DATel SYSTEMS INCORPORATED	MICROSOFT OFFICE LICENSE FOR PSYCH	0100 Psychology Services		665.00
0000010274	SOCIAL THINKING	SO EMO CURRICULUM MARTIGNETTI	0100 Special Education		2,011.51
0000010275	CELEBRATE LIFE	PLAQUES/FRAmE TAGS	0100 Superintendent		118.80
0000010276	AZTEC FIRE & SAFETY INC.	ANNUAL INSPECTION OF LF AUTOMATIC FI	0100 Maintenance & Operations		10,367.14
0000010277	KRISTEN MARIE EVELAND	CGI DEVELOPMENT	0100 Lakeview		900.00
0000010278	Kristel Anne Boe dba ArtBeat San Diego	1st GRADE ASSEMBLY PAINTING	0100 Lakeview		1,000.00
0000010279	HELPING OUR WAY	LV KINDER CATERPILLAR	0100 Lakeview		600.00
0000010280	AG PARTS WORLDWIDE, INC.	AGPARTS BALANCE DUE, INVOICE #	0100 Technology		162.57
0000010281	AMAZON CAPITAL SERVICES, INC.	LV MEGAPHONES-PLAYGROUND	0100 Lakeview		195.63
0000010282	COMMITTEE FOR CHILDREN	WG SECOND STEP EARLY LEARNING	0100 Winter Gardens		537.67
0000010283	IMAGINE LEARNING, LLC	LC - EL TRADE BOOKS 3rd GRADE	0100 Education Services		4,552.14
0000010284	K F Enterprises	COWBOY KEN ASSEMBLY	0100 Lakeview		600.00
0000010286	COUNTY OF SAN DIEGO, DEH	DEHQ FACILITY PERMIT	0100 Transportation		1,180.00
0000010287	WPS	ARIZONA-4 WORD AND SENTENCE	0100 Special Education		74.67
0000010288	MULTI-HEALTH SYSTEMS INC	ASRS PARENT FORM (2-5 YEARS)	0100 Psychology Services		930.00
0000010290	ORANGE COUNTY DEPT. OF EDU.	ORANGE COUNTY DOE - CA MTSS	0100 Special Education		1,996.00
0000010293	MELODEE RUPE	CATEGORY 1 ERATE ACTIVITY 1/1/	0100 Business Services		3,437.50
0000010294	DSHDD, LLC dba DAVIS FARMS	AVOCADOS	0100 Child Nutrition		2,983.06
0000010295	ATTAINMENT COMPANY INC.	GT-60W - GOTALK BUTTON - A MAG	0100 Special Education		101.29
0000010298	WILKINSON HADLEY KING & CO LLP	2022-2023 BOND AUDIT	0100 Business Services		5,250.00
0000010299	OCML, INC/THE STAGE DEPOT	4X8 INDUSTRIAL FINISH STAGE PA	0100 Lemon Crest		22,934.18
0000010301	Entourage Yearbooks	DREAM YEARBOOKS	0100 Flex School		798.00
0000010303	CPI	CPI - GABBY	0100 Special Education		4,349.00
0000010306	EASTERN SAN DIEGO COUNTY JUNIOR FAIR	LEASE OF EASTERN SAN DIEGO COU	0100 Superintendent		1,350.00
0000010307	MCGRAW-HILL	CORRECTIVE READING DECODING A	0100 Special Education		1,312.18
0000010308	MCGRAW-HILL	READING MASTERY READING WORKBO	0100 Special Education		1,728.00
0000010309	GREG A. MARVEL	TRANSTRAKS 2023-24 ANNUAL LICE	0100 Transportation		5,445.00
0000010312	ROCHESTER 100, INC.	LP PURPLE FOLDERS	0100 Lindo Park		937.43
					\$ 101,174.64
0000010255	MAD WRAPS	TABLE WRAPS	1300 Child Nutrition		\$ 989.15
0000010258	CRISP ENTERPRISES, INC./CRISP IMAGING	CRISP IMAGING BANNERS C/N	1300 Child Nutrition		\$ 195.79
0000010268	SAN DIEGO RESTAURANT SUPPLY	DUKE INSTALLATION - RV	1300 Child Nutrition		\$ 49,842.64
0000010300	DAVID PALMER dba DUNK TANK MARKETING,	DUNK TANK MARKETING	1300 Child Nutrition		\$ 3,588.00
0000010311	ECONOMY RESTAURANT & SUPPLY CO	ECONOMY- CHILL PANS	1300 Child Nutrition		\$ 200.76
					\$ 54,816.34
0000010302	EAST COUNTY GAZETTE	EAST COUNTY GAZETTE- TDS	4000 Tierra Del Sol		\$ 136.00
					\$ 136.00
TOTAL PURCHASE ORDERS					\$ 156,126.98
TOTAL (01) GENERAL FUND PO's					101,174.64
TOTAL (08) ASB FUND PO's					0.00
TOTAL (12) CHILD DEVELOPMENT PO's					0.00
TOTAL (13) CHILD NUTRITION FUND PO's					54,816.34
TOTAL (25) DEVELOPER FEES PO's					0.00
TOTAL (40) SPECIAL FUND PO's					136.00

APRIL 2024 CHANGE ORDERS

PO No.	Supplier	PO Ref	Funct	Site/Dept	Total
9230	AMAZON CAPITAL SERVICES, INC.	C/O AMAZON PO 9230	0100	Flex School	156.00
9433	EL CAJON FORD	C/O EL CAJON FORD PO 9433	0100	Maintenance & Operations	1,000.00
9279	OFFICE DEPOT, INC	C/O PO OFFICE DEPOT PO 9279	0100	Education Services	250.00
9516	MISSION IMPRINTABLES, INC	C/O MISSION IMPRINT PO 9516	0100	ESS/ASES/PreSchool	5,000.00
9450	OREILLY AUTO PARTS	C/O O'REILLY PO 9450	0100	Maintenance & Operations	1,000.00
9247	AMAZON CAPITAL SERVICES, INC.	C/O AMAZON PO 9247	0100	Lakeview	500.00
9431	DIXIELINE PROBUILD	C/O DIXIELINE PO 9431	0100	Maintenance & Operations	1,000.00
9230	AMAZON CAPITAL SERVICES, INC.	C/O AMAZON PO 9230	0100	Flex School	500.00
9257	AMAZON CAPITAL SERVICES, INC.	C/O AMAZON PO 9257	0100	Tierra Del Sol	5,000.00
9232	AMAZON CAPITAL SERVICES, INC.	C/O AMAZON PO 9232	0100	Human Resources	200.00
9249	AMAZON CAPITAL SERVICES, INC.	C/O AMAZON Title I PO 9249	0100	Lindo Park	3,000.00
9557	SOUTHWEST SCHOOL & OFFICE SUPPLY	C/O SOUTHWEST SCHOOL & OFFICE SUPPLY PO 9557	0100	Lindo Park	4,019.73
9430	COMPETTIVE METALS, INC	C/O COMPETTIVE METALS PO 9430	0100	Maintenance & Operations	500.00
					\$ 22,125.73

9320	ES FOODS INC.	C/O ES Foods	1300	Child Nutrition	\$ 30,000.00
------	---------------	--------------	------	-----------------	---------------------

TOTAL CHANGE ORDERS \$ 52,125.73

TOTAL (01) GENERAL FUND CO'S	22,125.73
TOTAL (08) ASB FUND CO'S	0.00
TOTAL (12) CHILD DEVELOPMENT FUND CO'S	0.00
TOTAL (13) CHILD NUTRITION FUND CO'S	30,000.00
TOTAL (25) DEVELOPER FEES CO'S	0.00
TOTAL (40) SPECAIL FUND CO'S	0.00

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: May 9, 2024

Agenda Item:

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

Background (Describe the 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 March 2024.

Fiscal Impact (Cost):

\$25,057.37

Funding Source:

General Fund Total: \$23,584.40, Child Development Fund Total: \$840.10, Child Nutrition: \$632.87

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 checked="" type="checkbox"/> Approval | <input type="checkbox"/> Explanation: Click here to enter text. |
| <input type="checkbox"/> Adoption | |

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 _____

ACC.ACCOUNT NAME	FIN.POSTING DATE	FIN.TRANSACTION AMOUNT	MCH.MERCHANT NAME	FUND	FIN.EXPENSE DESCRIPTION
BEISIGL,BRIAN	03/03/2024	163.44	AMAZON WEB SERVICES	0100	WEB CLOUD HOSTING
CLARK,DANIELLE	03/26/2024	461.26	SP GANDER PUBLISHING	0100	VISUALIZING VERBALIZING KIT FOR BROOKE ROWAN SLP
CLARK,DANIELLE	03/20/2024	237.50	SP MHS: MULTI HEALTH	0100	AUTISM SPECTRUM RATING SCALE
COX,GRACE	03/21/2024	20.74	TEACHERSPAYTEACHERS.CO	0100	FOR STUDENTS SOCIAL AND EMOTIONAL LEARNING
COX,GRACE	03/21/2024	46.02	NAESP-PEAP	0100	CITIZEN SHIP AWARDS FOR 5TH GRADE
COX,GRACE	03/10/2024	422.50	BRAINPOP.COM	0100	RENEWED MEMBERSHIP AT LOWER PRICE K-5 ACADEMICS PROGRAM
COX,GRACE	03/07/2024	21.00	SCHOLASTIC EDUCATION	0100	5TH GRADE BOOKS FOR LIBRARY
COX,GRACE	03/06/2024	(575.00)	BRAINPOP.COM	0100	CANCELED THE MEMBERSHIP
DAVIS,LISA	03/24/2024	1,200.00	THE BRIGANTINE INC	0100	REIMBURSEMENT FOR LD RETIREMENT
DAVIS,LISA	03/21/2024	650.00	CALIFORNIA SCHOOL BOAR	0100	PD TRAINING R. CAMARERO
DAVIS,LISA	03/01/2024	38.00	SDIA AIRPORT PARKING	0100	REIMBURSEMENT FOR ACSA BUSINESS COUNCIL L. DAVIS
DEROSIER,LISA A	03/22/2024	6.50	TST* NOTHING BUNDT CAK	0100	EMPLOYEE OF THE YEAR BUNDLET
DEROSIER,LISA A	03/13/2024	58.50	TST* NOTHING BUNDT CAK	0100	EMPLOYEE OF THE YEAR BUNDLETS
DEROSIER,LISA A	03/07/2024	473.96	SOUTHWEST AIRLINES	0100	FLIGHT TO DELOITTE: J. MIETZEL
DEROSIER,LISA A	03/07/2024	473.96	SOUTHWEST AIRLINES	0100	FLIGHT TO DELOITTE: J. ROSA
DEROSIER,LISA A	03/07/2024	473.96	SOUTHWEST AIRLINES	0100	FLIGHT TO DELOITTE: R TAYLOR
DEROSIER,LISA A	03/06/2024	32.50	TST* NOTHING BUNDT CAK	0100	EMPLOYEE OF THE YEAR BUNDLETS (MISPLACED RECEIPT)
DEROSIER,LISA A	03/03/2024	6.50	TST* NOTHING BUNDT CAK	0100	EMPLOYEE OF THE YEAR BUNDLET
DEXHEIMER,BROOKE	03/13/2024	840.00	SEAWORLD-SAN DIEGO	0100	SEAWORLD ADMISSION--NO TAX WAS CHARGED--PLEASE REFER TO RECEIPT
FERNANDEZ,PATRICIA E	03/07/2024	139.98	SOUTHWEST AIRLINES	0100	CASCWA CONFERENCE RETURN FLIGHT
GREEN,TESSA	03/08/2024	147.40	GRUBHUBGREEKCHICKEN	0100	FOOD FOR STAFF MEETING
MULL,STEVE	03/31/2024	199.00	FS *BOINX	0100	SOFTWARE
MULL,STEVE	03/14/2024	124.28	WEISSMAN'S THEATRICAL	0100	SHOW CHOIR COSTUMES
MULL,STEVE	03/14/2024	201.15	WEISSMAN'S THEATRICAL	0100	SHOW CHOIR COSTUMES
MULL,STEVE	03/08/2024	527.91	HOMEDEPOT.COM	0100	SHED FOR FFA SUPPLIES
MULL,STEVE	03/03/2024	430.00	CALIFORNIA FFA	0100	FFA LEADERSHIP CONFERENCE
MURPHY,JERRED C	03/28/2024	109.56	WM SUPERCENTER #2253	0100	SANDWICHES FOR FIELD TRIP
MURPHY,JERRED C	03/19/2024	667.53	SAMSCLUB.COM	0100	SPLIT - MISC SNACK ITEMS FOR PROGRAM (33.33%)
MURPHY,JERRED C	03/19/2024	667.53	SAMSCLUB.COM	0100	SPLIT - MISC SNACK ITEMS FOR PROGRAM (33.33%)
MURPHY,JERRED C	03/19/2024	667.54	SAMSCLUB.COM	0100	SPLIT - MISC SNACK ITEMS FOR PROGRAM (33.34%)
MURPHY,JERRED C	03/17/2024	292.48	SAMSCLUB #6235	0100	MISC SNACKS FOR PROGRAM
ORAHOOD,SAMANTHA	03/29/2024	359.80	JERSEY MIKES 20071	0100	ESS SPRING CAMP
ORAHOOD,SAMANTHA	03/25/2024	1,246.50	GROSSMONT CINEMA	0100	ESS SPRING CAMP FIELDTRIP
ORAHOOD,SAMANTHA	03/21/2024	258.12	JB DUKE HOTEL	0100	J. CHANDLER & N. GENET HEARTLAND MOSIC TRAINING
ORAHOOD,SAMANTHA	03/17/2024	1,211.12	HILTON	0100	M. MANN CSHA CONVENTION
ORAHOOD,SAMANTHA	03/17/2024	1,211.12	HILTON	0100	F. TRIPP CSHA CONVENTION
ORAHOOD,SAMANTHA	03/15/2024	1,050.00	SP MHS: MULTI HEALTH	0100	MHS BEYOND ASSESSMENTS
ORAHOOD,SAMANTHA	03/05/2024	1,185.70	DELTA	0100	J. CHANDLER SNA ANNUAL CONFERENCE AIRFARE
ORAHOOD,SAMANTHA	03/05/2024	1,185.70	DELTA	0100	C. SILVA SNA ANNUAL CONFERENCE AIRFARE
ORAHOOD,SAMANTHA	03/05/2024	1,185.70	DELTA	0100	R. ASTOLFI SNA ANNUAL CONFERENCE AIRFARE
ORAHOOD,SAMANTHA	03/05/2024	1,185.70	DELTA	0100	K. SUMMERS SNA ANNUAL CONFERENCE AIRFARE
ORAHOOD,SAMANTHA	03/05/2024	1,185.70	DELTA	0100	H. RAGOLE-GUIDI SNA ANNUAL CONFERENCE AIRFARE
OWENS,TODD	03/15/2024	225.00	SOCAL WATER HEATING SP	0100	TROUBLE SHOOT LV WATER HEATER
PRICE,JENNIFER M	03/14/2024	118.26	GREEK CHICKEN	0100	STAFF LUNCH WITH PROFESSIONAL DEVELOPMENT - AGENDA ATTACHED
ROSA,JIM	03/22/2024	229.67	PRIMO WATER	0100	WATER FOR CAMPUS
SINATRA,CHRISTINE	03/05/2024	100.00	SAN DIEGO COUNTY SUPER	0100	C. SINATRA 2024 RECRUITMENT FAIR DISTRICT REGISTRATION
SUMMERS,KRISTIE	03/21/2024	45.00	JETBLUE AIRWAYS (JETBLUE)	0100	CONFERENCE
SUMMERS,KRISTIE	03/21/2024	45.00	JETBLUE AIRWAYS (JETBLUE)	0100	LUGGAGE JENNIFER CHANDLERCONFERENCE
SUMMERS,KRISTIE	03/20/2024	7.23	UBER TRIP	0100	CONFERENCE RIDE
SUMMERS,KRISTIE	03/20/2024	38.94	UBER TRIP	0100	CONFERENCE

ACC.ACCOUNT NAME	FIN.POSTING DATE	FIN.TRANSACTION AMOUNT	MCH.MERCHANT NAME	FUND	FIN.EXPENSE DESCRIPTION
SUMMERS,KRISTIE	03/20/2024	28.94	UBER TRIP	0100	CONFERENCE
SUMMERS,KRISTIE	03/19/2024	40.00	JETBLUE AIRWAYS (JETBLUE)	0100	LUGGAGE - CONFERENCE IN NORTH CAROLINA JENNIFER CHANDLER
SUMMERS,KRISTIE	03/19/2024	40.00	JETBLUE AIRWAYS (JETBLUE)	0100	LUGGAGE NORTH CAROLINA NICOLE GENET
TAYLOR,RHONDA L	03/07/2024	521.96	SOUTHWEST AIRLINES	0100	FLIGHT TO DELOITTE: T GREEN
TAYLOR,RHONDA L	03/07/2024	521.96	SOUTHWEST AIRLINES	0100	FLIGHT TO DELOITTE: J. PRICE
TAYLOR,RHONDA L	03/07/2024	521.96	SOUTHWEST AIRLINES	0100	FLIGHT TO DELOITTE: B. DEXHEIMER
TAYLOR,RHONDA L	03/07/2024	521.96	SOUTHWEST AIRLINES	0100	FLIGHT TO DELOITTE: D. CLARK
WINSPEAR,NATALIE	03/20/2024	87.66	GREEK STYLE CHICKEN -	0100	LUNCH FOR DA MEETING
BOWMAN,ROBYN	03/31/2024	407.33	MONTEREY PLAZA HOTEL	1200	HOTEL RESERVATION FOR GREAT ADMINISTRATORS SEMINAR
BOWMAN,ROBYN	03/29/2024	362.34	SAMSLUB #6235	1200	MISC PROGRAM SUPPLIES INCLUDING CLEANING PRODUCTS, PAPER GOODS, SNACKS...
BOWMAN,ROBYN	03/20/2024	46.09	DOLLAR TREE	1200	HOLIDAY DECORATIONS AND PROJECTS
BOWMAN,ROBYN	03/14/2024	24.34	DOLLAR TREE	1200	HOLIDAY DECORATIONS AND ACTIVITIES
SUMMERS,KRISTIE	03/24/2024	43.25	TSHIRT MART	1300	WORK POLOS EMBROIDERY SET UP
SUMMERS,KRISTIE	03/20/2024	9.73	UBER TRIP	1300	CONFERENCE AIRPORT TO HOTEL
SUMMERS,KRISTIE	03/17/2024	99.50	REMOTEPG 818-275-5909	1300	PROFESSIONAL SERVICES - REMOTE INTO SCHOOL SITE COMPUTERS
SUMMERS,KRISTIE	03/10/2024	55.59	MARY'S DONUTS	1300	DONUTS FOR MEETING - TRAINING
SUMMERS,KRISTIE	03/08/2024	288.46	MISSION NUTRITION	1300	SCHOOL LUNCH SACKS
SUMMERS,KRISTIE	03/26/2024	13.21	TSHIRT MART	1300	WORK POLOS EMBROIDERY SET UP
SUMMERS,KRISTIE	03/24/2024	123.13	TSHIRT MART	1300	EMBROIDERY ON POLOS

25,057.37

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: 5/9/2024

Agenda Item:

Approval of Resolution #'s 2024-20, 2024-21, 2024-22, 2024-23 as LUSD's Authorized Agents

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

Approval is requested of the following Resolutions:

2024-20: Authorized Agents to receive mail/pick up warrants-Lisa Davis, Cathy Nevins, Lamia Matti, Keri Wutzke, Aimee McReynolds, Samantha Orahood, Kim Motl, Lisa Mendoza

2024-21: Payment Order Resolution-Lisa Davis

2024-22: Authorized Agent to Sign School Orders (Commercial Warrants)-Lisa Davis

2024-23: Authorizing Replacement of Warrants-Rhonda Taylor, Lisa Davis, Natalie Winspear, Samantha Orahood

Fiscal Impact (Cost):

None

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: Click here to enter text. |
| <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 _____

RESOLUTION # 2024-20
**RESOLUTION DESIGNATING AUTHORIZED AGENT TO RECEIVE MAIL
AND PICK UP WARRANTS AT THE COUNTY OFFICE OF EDUCATION**

Lakeside Union _____ School District, San Diego County ON MOTION

OF member _____, seconded by member _____

effective July 1, 2024 through June 30, 2025 _

IT IS RESOLVED AND ORDERED that:

1. The authorized agent (**one person only**) to receive mail from the Accounting/Payroll Sections is Lisa Davis
2. The authorized person(s) or district(s) to pick up warrants from the County Office (other than the mail addressee) are:
Lisa Davis, Samantha Orahoad, Cathy Nevins, Keri Wutzke, Aimee McReynolds
Lamia Matti, Kim Motl, Lisa Mendoza

-
- | | | | | |
|----|---|--------------------------|--------------------------|---|
| | mail | hold | consortium | |
| 3. | Check one <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Monthly payroll warrants each and every month. |
| | Check one <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Daily/Hourly payroll warrants each and every month. |

IT IS FURTHER RESOLVED that, this motion shall stand and that all additions and deletions shall be submitted in writing to the San Diego County Office of Education.

PASSED AND ADOPTED by said Governing Board on May 9, 2024 by the following vote:
(date)

AYES:___ MEMBERS

NOES:___ MEMBERS

ABSENT:___ MEMBERS

STATE OF CALIFORNIA)
COUNTY OF SAN DIEGO) SS

I, Jim Bennett Clerk of the Governing Board, do hereby certify that the foregoing is a full, true, and correct copy of a resolution duly passed and adopted by said Board at a regularly called and conducted meeting held on said date.

Secretary/Clerk of the Governing Board

Manual signature(s) of authorized person(s):

Facsimile signature(s), if applicable:
(Rubber Stamp)

[Handwritten signature]

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[Handwritten signature]

[Handwritten signature]

[Handwritten signature]

RESOLUTION # 2024-21
PAYMENT ORDER RESOLUTION

Lakeside Union School District, San Diego County ON MOTION
OF member _____, seconded by member _____
effective July 1, 2024 through June 30, 2025.

IT IS RESOLVED AND ORDERED that, in accordance with the provisions of Section 3100 et seq., Chapter 8, Division 4, Title I of the Government Code (**all districts**), the following person(s) be and is hereby designated to ascertain and certify that each employee of said district has taken the oath of allegiance.

Lisa Davis or _____.

IT IS FURTHER RESOLVED AND ORDERED that, in accordance with the payroll procedure provided in Education Code Section 45310 (**merit system districts only**), no warrant shall be drawn by or on behalf of the governing board of this district for the payment of any salary or wage to any employee in the classified service unless the assignment bears the certification of the following person:

N/A, Personnel Director

IT IS FURTHER RESOLVED that this motion shall stand and that all additions and deletions shall be submitted in writing to the San Diego County Office of Education.

PASSED AND ADOPTED by said Governing Board on May 9, 2024 by the following vote:
(date)

AYES: _____ MEMBERS

NOES: _____ MEMBERS

ABSENT: _____ MEMBERS

STATE OF CALIFORNIA)
COUNTY OF SAN DIEGO) SS


I, Jim Bennett, Clerk of the Governing Board, do hereby certify that the foregoing is a full, true, and correct copy of a resolution duly passed and adopted by said Board at a regularly called and conducted meeting held on said date.

Secretary/Clerk of the Governing Board

Manual signature(s) of authorized person(s):

Facsimile signature(s), if applicable:
(Rubber Stamp) Gov Code Sec. 5501





RESOLUTION # 2024-22
RESOLUTION DESIGNATING AUTHORIZED AGENT TO SIGN SCHOOL ORDERS
(COMMERCIAL WARRANTS)

Lakeside Union School District, San Diego County ON MOTION

OF member _____, seconded by member _____
effective July 1, 2024 through June 30, 2025.

IT IS RESOLVED AND ORDERED that, pursuant to the provisions of Education Code Section 42632 or 85232, Lisa Davis be and is hereby authorized to sign any and all orders in the name of said District, drawn on the funds of said District.

IT IS FURTHER RESOLVED that this motion shall stand and that all additions and deletions shall be submitted in writing to the San Diego County Office of Education.

PASSED AND ADOPTED by said Governing Board on May 9, 2024 by the following vote:
(date)

AYES: _____ MEMBERS

NOES: _____ MEMBERS

ABSENT: _____ MEMBERS


STATE OF CALIFORNIA)
COUNTY OF SAN DIEGO) SS


I, Jim Bennett, Clerk of the Governing Board, do hereby certify that the foregoing is a full, true, and correct copy of a resolution duly passed and adopted by said Board at a regularly called and conducted meeting held on said date.

Secretary/Clerk of the Governing Board

Manual signature(s) of authorized person(s):

Facsimile signature(s), if applicable:
(Rubber Stamp)





RESOLUTION 2024-23 **AUTHORIZING THE REPLACEMENT OF WARRANTS**

On a motion of Member _____, seconded by Member _____ the following Resolution is adopted:

WHEREAS, during the course of business, this School District issues payroll and commercial warrants for the payments of goods and services received by the District; and
WHEREAS, payroll and commercial warrants are lost, stolen, mutilated, or expire upon occasion; and
WHEREAS, a petition for issuance of a new warrant may be presented by the payee pursuant to Government Code section 29802.
NOW, THEREFORE BE IT RESOLVED by the governing Board of the Lakeside Unon School District of San Diego County, California, that the following persons shall be authorized to reissue new payroll and commercial warrants upon presentation of a properly completed petition for issuance of a new warrant if such new warrant does not exceed the amount of the original warrant.

	Manual Signature	Facsimile Signature
Superintendent	<u>Rhonda Taylor</u> <u>Paul Davis</u>	<u>Rhonda Taylor</u> <u>Paul Davis</u>
Assistant Superintendent, Business Services	<u>N/A</u>	<u>N/A</u>
Assistant Superintendent, Employer/Employee Relations	<u>[Signature]</u>	<u>[Signature]</u>
Assistant Superintendent, Educational Services	<u>[Signature]</u>	<u>[Signature]</u>
Director of Accounting Finance	<u>[Signature]</u>	<u>[Signature]</u>

PASSED AND ADOPTED by said Governing Board on 5/9/24

AYES: _____
NOES: _____
ABSENT: _____

I, Jim Bennett Clerk of the Governing Board, do hereby certify that the foregoing is a full, true, and correct copy of a resolution adopted by the Governing Board at a regularly called and conducted meeting held on said date.

Clerk of the Governing Board

LAKE SIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: May 9, 2024

Agenda Item:

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

LUSD CONTRACTS 2023-24

Agency Name	Description	Contract #	Dept./Site	Began	Ends	Amount (not to exceed)
Artbeat San Diego	Art Teacher offering creative & informative art experience for students		Thank you for always beir	5/9/2024	5/9/2024	\$1,000.00
Brenda Wilson	Preschool IEP's	EC2024-01A	SPED	7/1/2023	6/30/2024	\$400.00
Helping Our Way	Intro to Pollination and Natural Habitat Program	L2024-016	LV	4/30/2024	4/30/2024	Not To Exceed \$600
KF Enterprises	Historical cowboy information including stories and songs	L2024-017	LV	4/18/2024	4/18/2024	Not To Exceed \$600
Solana Center for Environmental Innovation	Presentation on Waste to Wealth	L2024-018	RV	4/22/2024	4/22/2024	\$0.00
Consulting & Inspection Services	DSA Services for Technology Building	V2024-109	Maint	4/15/2024		\$9,200.00
Consulting & Inspection Services	LF Switchgear & SDG&E Sign Off	V2024-110	Maint	4/15/2024		\$3,450.00
Steve Halfaker	Superintendent Coaching	EC2024-02	Supt	4/15/2024	6/30/2025	\$120/hr
Psychology 360	IEP	I2024-29	SPED	3/11/2024	6/30/2024	Not To Exceed \$14,180
Quadient Leasing USA	Upgraded Mailing Machine & Supplies	L2024-019	ED SERVICES	6/1/2024	6/1/2029	\$23,818.20
CTE Grant	CTE/CAREER PATHWAY	V2024-112	ED SERVICES	1/1/2024	6/30/2026	\$54,378.00
Rizalyn Remotigue	Parent/Guardian Transportation Agreement	T2024-004	SPED	4/23/2024	6/30/2024	.067/mile
MCK/VENTO	Parent /Guardian Transportation Agreement	T2024-005	PUPIL SERVICES	4/7/2024	6/30/2024	.67/mile
MCK/VENTO	Parent /Guardian Transportation Agreement	T2024-006	PUPIL SERVICES	3/21/2024	6/30/2024	.67/mile
El Capitan Stadium Assoc	Promotion Ceremonies	V2024-113	MAINT	6/7, 6/10-6/13	6/13/2024	\$300.00
Math Tranformations	Math Professional Learning For LMS	I2024-25A	LMS	2/21/2024	6/7/2024	\$10,000.00
Helping Our Way	Intro to Pollination and Natural Habitat Program	L2024-019	DA	5/13/2024	5/14/2024	Not To Exceed \$800

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: May 9, 2024

Agenda Item:

Approval of contracts for 2024-25 school year.

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

Approval of attached contracts for the 2024-25 school year with various vendors.

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

LUSD CONTRACTS 2024-25

Agency Name	Description	Contract #	Dept./Site	Began	Ends	Amount (not to exceed)
Annual Contracts 2024-5						
Ron & Karen Cook Stories About Inspiring People	Boost Enrollment	V2025-02	Supt	7/1/2024	6/30/2025	\$22,350.00
CODESP Public HR	Annual Membership Fee	V2025-01	HR	7/1/2024	6/30/2025	\$2,675.00
DWK	Professional Services	V2025-03	SUPT	7/1/2024	6/30/2026	\$130 to \$485/HR
Melodee Rupe	Erate/ECF Documents	V2025-04	BS	7/1/2024	6/30/2026	See Rate Sheet Enclosed
EDPRESS	Website Development and Support	V2025-05	BS	7/1/2024	6/30/2025	\$17,2820/yr
Renaissance	DnA Online System (Student Data Storage)	V2025-06	Ed Services	7/1/2024	6/30/2027	\$80,249.76 (paid over 3 years)

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: May 9, 2024

Agenda Item:

Resolution No. 2024-25 Temporary Interfund Money Transfer

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

Approval is requested of Resolution No. 2024-25 allowing temporary transfer of money between funds to meet the cash flow needs and obligations of the District. Amounts transferred shall be repaid in the same fiscal year or in the following fiscal year as stated. The resolution would be in effect for the next fiscal year 2024-25. The funds to be included would be the General Fund (01), Child Development Fund (12) and the Child Nutrition (13) and Deferred Maintenance/Special Reserves (40).

Fiscal Impact (Cost):

N/A

Funding Source:

General Fund
Child Development
Child Nutrition
Deferred Maintenance

Addresses Emphasis Goal(s):

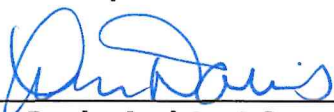
#1: Academic Achievement **#2:** Social Emotional **#3:** Physical Environments

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: Click here to enter text. |
| <input type="checkbox"/> Adoption | |

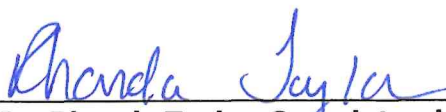
Originating Department/School: Business Services

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

RESOLUTION NO. 2024-25

RESOLUTION TO ESTABLISH TEMPORARY INTERFUND)

TRANSFERS OF SPECIAL OR RESTRICTED FUND MONEYS)

ON MOTION of Member _____, seconded by Member _____, the following resolution is hereby adopted:

WHEREAS, the governing board of any school district may direct that moneys held in any fund or account may be temporarily transferred to another fund or account of the district for payment of obligations as authorized by Education Code section 42603, and

WHEREAS, the transfer shall be accounted for as temporary borrowing between funds or accounts and shall not be available for appropriation or be considered income to the borrowing fund or account, and

WHEREAS, amounts transferred shall be repaid either in the same fiscal year, or in the following fiscal year if the transfer takes place within the final 120 calendar days of a fiscal year,

THEREFORE, BE IT RESOLVED that the Governing Board of the Lakeside Union School District, in accordance with the provisions of Education Code section 42603 adopts the following authorization for fiscal year 2024 -2025 to temporarily transfer funds between the following funds provided that all transfers are approved by the Superintendent or his designee:

General Fund	0100
Child Development	1200
Child Nutrition	1300
Deferred Maintenance/Special Reserves	4000

PASSED AND ADOPTED by the Governing Board on May 9, 2024, by the following vote:

- AYES:
- NOES:
- ABSENT:

STATE OF CALIFORNIA)
) ss
COUNTY OF SAN DIEGO)

I, Jim Bennett, Clerk/Secretary of the Governing Board, do hereby certify that the foregoing is a full, true, and correct copy of a resolution passed and adopted by the Board at a regularly called and conducted meeting held on said date.

WITNESSED my hand this 9th day of June, 2024.

Clerk/Secretary of the Governing Board

LAKE SIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: 5/9/24

Agenda Item:

Amend the 2023-2024 Work Calendar for CSEA to reflect a minor adjustment

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

Approval is requested of an amendment to the 2023-2024 CSEA work calendar to reflect a minor adjustment to 11-month employee's calendars for 1 less work day in June. These employees work a total of 231 days each year (including holidays) and their final work day of the 2023-24 school year will be June 27th.

Fiscal Impact (Cost):

N/A

Funding Source:

N/A

Addresses Emphasis Goal(s):

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

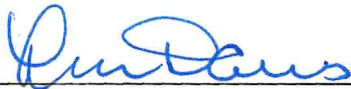
Recommended Action:

- | | |
|---|---|
| <input checked="" type="checkbox"/> Informational | <input 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 | |

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 _____

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

2023-24 Classified Work Calendar

JULY																															
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	S	M	
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	29	29	30	31	
		1	Fourth of July	2	3	4			5	6	7	8	9			10	11	12	13	14			15	16	17	18	19			20	
																															1
		1			2	3	4			5	6	7	8	9																	

1

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

SEPTEMBER																													
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
44			Labor Day	45	46	47	48			49	50	51	52	53			54	55	56	57	58			59	60	61	62	63	
25				26	27	28	29			30	31	32	33	34			35	36	37	38	39			40	41	42	43	44	
19				20	21	22	23			24	25	26	27	28			29	30	31	32	33			34	35	36	37	38	
20				21	22	23	24			25	26	27	28	29			30	31	32	33	34			35	36	37	38	39	
10				11	12	13	14			15	16	17	18	19			20	21	22	23	24			25	26	27	28	29	

2

OCTOBER																														
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
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
	64	65	66	67	68			69	70	71	72	73			74	75	76	77	78			79	80	81	82	83			84	85
	45	46	47	48	49			50	51	52	53	54			55	56	57	58	59			60	61	62	63	64			65	66
	39	40	41	42	43			44	45	46	47	48			49	50	51	52	53			54	55	56	57	58			59	60
	40	41	42	43	44			45	46	47	48	49			50	51	52	53	54			55	56	57	58	59			60	61
	30	31	32	33	34			35	36	37	38	39			40	41	42	43	44			45	46	47	48	49			50	51

NOVEMBER																															
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		
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		
86	87	88			89	90	91	92	Veterans Day			93	94	95	96	97			98	99	100	Thanksgiving	Local Holiday			101	102	103	104		
67	68	69			70	71	72	73					74	75	76	77	78			V	NW			NW				79	80	81	82
61	62	63			64	65	66	67					68	69	70	71	72			V	NW			NW				73	74	75	76
62	63	64			65	66	67	68					69	70	71	72	73			V	NW			NW				74	75	76	77
52	53	54			55	56	57	58					59	60	61	62	63			V	NW			NW				64	65	66	67

3

4

5

MARCH																														
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	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			
134			135	136	137	138	139			140	141	142	143	144			145	146	147	148	149			V	V	V	V			
128			129	130	131	132	133			134	135	136	137	138			139	140	141	142	143			V	V	V	V			
129			130	131	132	133	134			135	136	137	138	139			140	141	142	143	144			V	V	V	V			
119			120	121	122	123	124			125	126	127	128	129			130	131	132	133	134			V	V	V	V			

14

APRIL																														
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	
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	
182	183	184	185	186			187	188	189	190	191			192	193	194	195	196			197	198	199	200	201			202	203	
V	V	V	NW	NW			150	151	152	153	154			155	156	157	158	159			160	161	162	163	164			165	166	
V	V	V	NW	NW			144	145	146	147	148			149	150	151	152	153			154	155	156	157	158			159	160	
V	V	V	NW	NW			145	146	147	148	149			150	151	152	153	154			155	156	157	158	159			160	161	
V	V	V	NW	NW			135	136	137	138	139			140	141	142	143	144			145	146	147	148	149			150	151	

MAY																															
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	
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	221				222	223	224	225	
167	168	169			170	171	172	173	174			175	176	177	178	179			180	181	182	183	184				185	186	187	188	
161	162	163			164	165	166	167	168			169	170	171	172	173			174	175	176	177	178				179	180	181	182	
162	163	164			165	166	167	168	169			170	171	172	173	174			175	176	177	178	179				180	181	182	183	
152	153	154			155	156	157	158	159			160	161	162	163	164			165	166	167	168	169				170	171	172	173	

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LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: May 9, 2024

Agenda Item:

Award Request for Proposal to Kyocera for Copier/MFD Hardware, and All Copy Products for Printer Services and supplies.

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

Approval is requested to award Kyocera for Copier/MFD Hardware and All Copy Products for Printer Services and Supplies. An extensive request for proposal process was done with the help of our Copier Management Consultant, Optimizon. A request for bids was sent out in February of 2023 and posted on the district website. This process resulted in a selection of 2-3 vendors in each request for service and interviews were conducted. Based on the total criteria of the RFP and the interview evaluation process, the District scored South Coast Copy Systems #1 for the Copier/MFD Hardware and Service. All Copy Products was scored #1 for Printer Service and Supplies. The District proposes the Board approve the results of the Executive Summary. The copier agreement would replace new and incoming copiers upon award of the agreement, while the existing Kyocera agreement would be in place on the currently leased machines.

Fiscal Impact (Cost):

See Executive Summary

Funding Source:

General Fund

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


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
Executive Summary
LUSD RFP 2024

Overview

Description	Objectives
LUSD RFP 2024 Copier/MFD Hardware and Service	<ul style="list-style-type: none"> To replace copiers that are at end of lease. Gather Pricing for an optional print driver management tool.
LUSD RFP 2024 Printer Service and Supplies	<ul style="list-style-type: none"> To maintain a service and supplies contract for the existing desktop printer fleet. Gather Pricing for an optional print driver management tool.

Team

A team consisting of Lisa Davis, Samantha Orahoad, Rachel Camarero, Brian Beisigl, and Aimee McReynolds, was formed to evaluate the current requirements, develop a sourcing strategy, and to evaluate vendor responses. Optimizon assisted the District with the creation and distribution of the RFPs to interested vendors.

Vendors

The RFPs were advertised per District and State requirements. RFP invitation packets and access to the Optimizon online bidding tool were emailed to the following vendors, and responses were as noted.

Vendor	LUSD RFP 2024 Copier/MFD Hardware and Service	LUSD RFP 2024 Printer Service and Supplies
All Copy Products	complete	complete
Business Complete Solutions (BCS)	non-responsive	non-responsive
CBE Office Solutions	complete	non-responsive
Circle Inc.	complete	non-responsive
Diversified Business Solutions	non-responsive	non-responsive
Fruth Group	non-responsive	non-responsive
Image 2000	non-responsive	non-responsive
Kyocera Document Solutions	complete	complete
Office1	non-responsive	non-responsive
One Stop Toner & Inkjet	non-responsive	non-responsive
Pacific Office Automation	complete	complete
Ricoh USA	complete	non-responsive
Sharp Business Systems	complete	complete
Signa Digital Solutions	complete	complete
South Coast Copy Systems	complete	non-responsive
Toshiba Business Solutions	complete	complete
UBEO Business Services	non-responsive	non-responsive
Velocity Imaging Products	non-responsive	non-responsive
Xerox Business Solutions (MRC)	complete	complete

RFP Process:

Analysis was conducted based on each vendor’s response to the terms and conditions, pricing for a period of (5) years, and equipment configurations.

The scoring criteria was shared with the vendors, and the proposals were scored as follows: Each question in each RFP was assigned a rank according to importance, and each category was assigned an overall percentage of importance. Lakeside Union School District and Optimizon carefully analyzed each proposal and assigned a score to each vendor’s response in each area.

Interviews were conducted virtually with the top vendor for the LUSD RFP 2024 Printer Service and Supplies, All Copy Products, and the top two vendors for the LUSD RFP 2024 Copier/MFD Hardware and Service, Pacific Office Automation and South Coast Copy Systems. Each vendor was provided with a set of questions and was asked to prepare a presentation to address the questions and a virtual demo of their proposed devices. The District evaluation team consisted of Brian Beisigl, Cathy Nevins, Aimee McReynolds, Kim Motl, Samantha Orahood, and Lisa Davis.

The total weighted scores and rankings for the RFP were as follows.

LUSD RFP 2024 Copier/MFD Hardware and Service	Total Score	Rank
South Coast Copy Systems (Canon)	621	1
Pacific Office Automation (Konica Minolta)	616	2
All Copy Products (Konica Minolta)	598	3
Sharp Business Systems (Sharp)	593	4
Circle Inc. (Toshiba)	580	5
Toshiba Business Solutions (Toshiba)	575	6
Pacific Office Automation (Canon)	572	7
CBE Office Solutions (Sharp)	560	8
Xerox MRC (Xerox)	560	9
Kyocera Document Solutions (Kyocera)	551	10
Signa Digital Solutions (Canon)	550	11
Ricoh USA (Ricoh)	520	12
Total Possible		

LUSD RFP 2024 Printer Service and Supplies	Total Score	Rank
All Copy Products	588	1
Pacific Office Automation	582	2
Xerox MRC	530	3
Signa Digital Solutions	527	4
Toshiba Business Solutions	517	5
Sharp Business Solutions	499	6
Kyocera Document Solutions	421	7
Total Possible		

RFP Result/Award

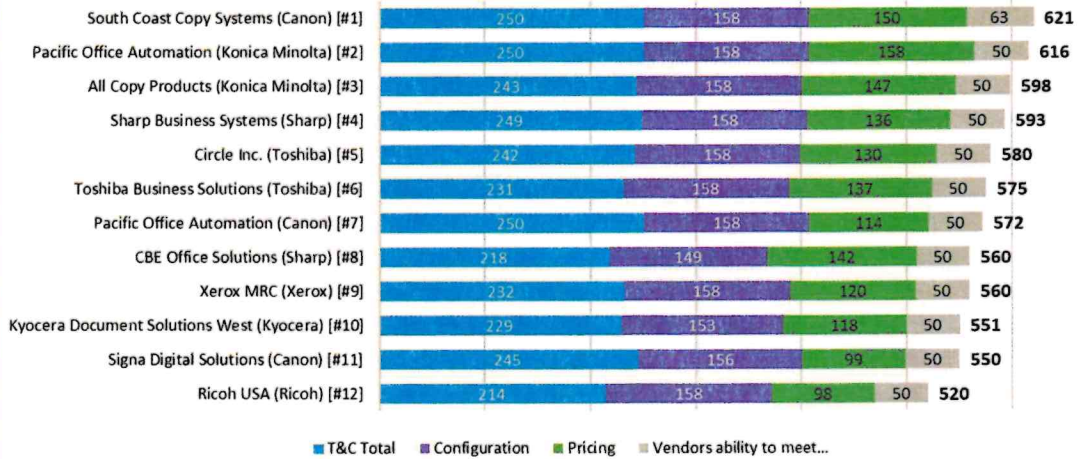
The highest scoring vendor for LUSD RFP 2024 Copier/MFD Hardware and Service is South Coast Copy Systems with Canon equipment. South Coast Copy Systems offered strong terms and conditions and competitive pricing. The highest scoring vendor for LUSD RFP 2024 Printer Service and Supplies is All Copy Products. All Copy Products offered strong terms and conditions and will continue to provide competitive pricing.

Based on the above criteria and the RFP evaluation process, the recommendation is to award LUSD RFP 2024 Copier/MFD Hardware and Service to South Coast Copy Systems and LUSD RFP 2024 Printer Service and Supplies to All Copy Products.

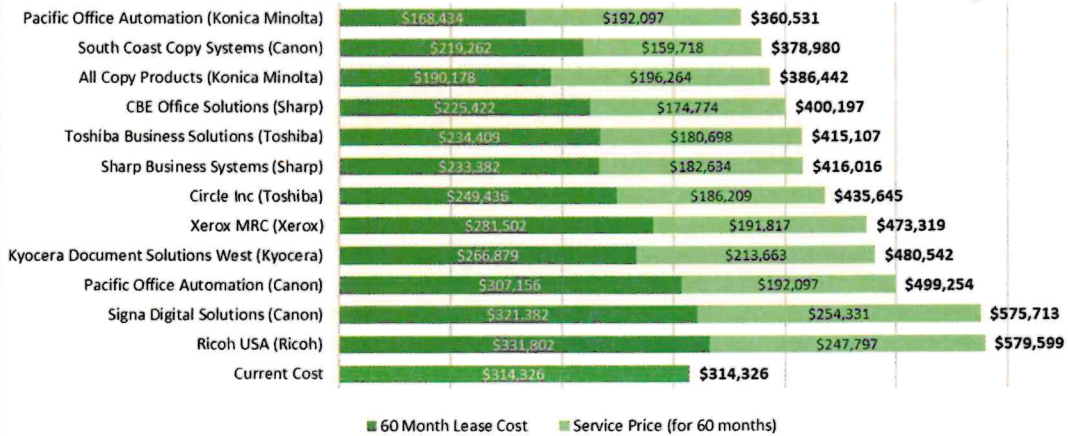
Financial Summary:

Component	Current Annual Cost	New Annual Cost
LUSD RFP 2024 Copier/MFD Hardware and Service: (Includes copier hardware service supplies)	\$62,865	\$75,796
LUSD RFP 2024 Printer Service and Supplies (Includes printer service and supplies)	\$16,740	\$10,722

Lakeside Union School District : LUSD 2024 RFP Copier/MFD Hardware and Service
OVERVIEW - WEIGHTED SCORES
 Vendor (make) [Rank]

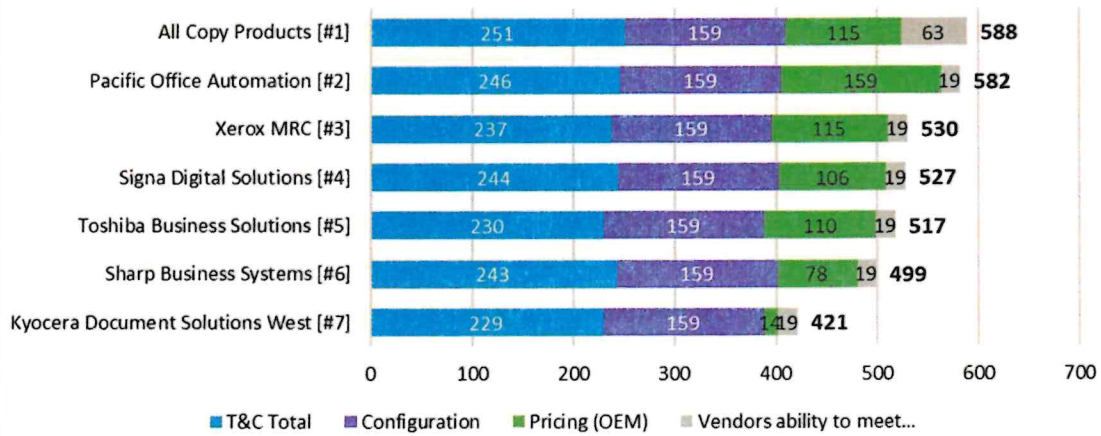


Lakeside Union School District : LUSD 2024 RFP Copier/MFD Hardware and Service
60 Month FMV Lease+Service
 Vendor (Make)



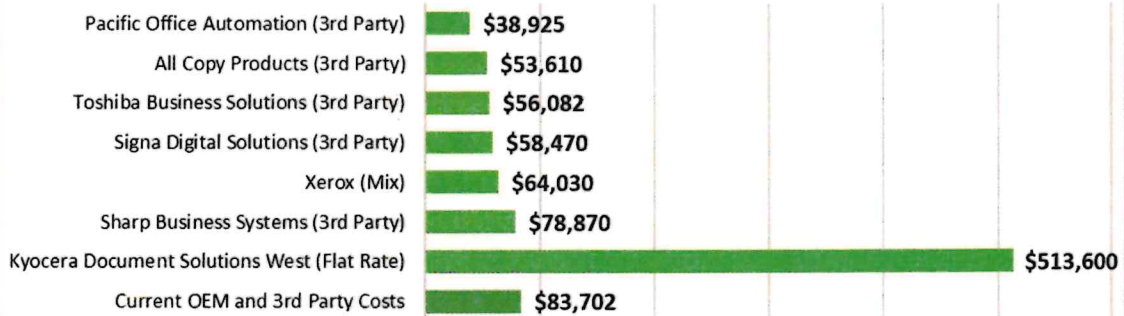
Lakeside Union School District : LUSD 2024 RFP Printer Service and Supplies
OVERVIEW - WEIGHTED SCORES

Vendor [Rank]



Lakeside Union School District : LUSD 2024 RFP Printer Service and Supplies
60 Month Cost of Service and Supplies

Vendor (Supply Type)



LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: May 9, 2024

Agenda Item:

Phone System and E911 District upgrade - through TIPS contract #230504

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

To bring the District to today's standards in E911 and update an antiquated phone system. We have currently outgrown our phone system and require newer features, the need to meet newer standards, and require replacement of "end of life" phones.

Fiscal Impact (Cost):

Phone System upgrade with 5yr. support and E911 services: \$379,506.24
Ongoing Monthly Cost: \$1233.00 for cloud phone service through First Digital
Stop monthly phone service through local AT&T (approx. \$2500.00)
Singlewire Intercom integration included for 5yrs

After 5yrs:

E911 - approx. \$10,000.00 (for 5yrs)

Singlewire Intercom integration approx. \$45,000.00 (for 5 years) - (This is already a current cost that will not be needed until after 5yrs)

Funding Source:

Unrestricted General Fund

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: Click here to enter text. |
| <input type="checkbox"/> Adoption | |

Originating Department/School: Technology

Submitted/Recommended By:

Brian Beisigl

Approved for Submission to the Governing Board:

Rhonda Taylor

Rhonda Taylor

Principal/Department Head Signature

Dr. Rhonda Taylor, Superintendent

Reviewed by Cabinet Member

[Signature]

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: May 9, 2024

Agenda Item:

Phone System and E911 District upgrade - through TIPS contract #230504

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

To bring the District to today's standards in E911 and update an antiquated phone system. We have currently outgrown our phone system and require newer features, the need to meet newer standards, and require replacement of "end of life" phones.

Fiscal Impact (Cost):

Phone System upgrade with 5yr. support and E911 services: \$379,506.24
Ongoing Monthly Cost: \$1233.00 for cloud phone service through First Digital
Stop monthly phone service through local AT&T (approx. \$2500.00)
Singlewire Intercom integration included for 5yrs

After 5yrs:

E911 - approx. \$10,000.00 (for 5yrs)

Singlewire Intercom integration approx. \$45,000.00 (for 5 years) - (This is already a current cost that will not be needed until after 5yrs)

Funding Source:

Unrestricted General Fund

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: Click here to enter text. |
| <input type="checkbox"/> Adoption | |

Originating Department/School: Technology

Submitted/Recommended By:

Brian Beisigl

Approved for Submission to the Governing Board:

Rhonda Taylor

Rhonda Taylor

Principal/Department Head Signature

Dr. Rhonda Taylor, Superintendent

Reviewed by Cabinet Member

[Signature]



Powering Business Transformation
 25 James Way, Eatontown, NJ 07724
 Phone: 732-847-9600 - Fax: 732-847-9620

Account Executive: William Hrehowsik

ASPIRE QUOTE #: **ATPQ52104-06**

Quote Date: 04/03/24



SOLD TO LAKESIDE UNION SCHOOL DISTRICT

Primary Contact: BRIAN BEISIGL
 Sold To Address: 9205 LAKEVIEW RD
 LAKESIDE, CA 92040
 Phone: 6193902600
 Email: bbeisigl@lsusd.net

SHIP TO LAKESIDE UNION SCHOOL DISTRICT

Primary Contact: BRIAN BEISIGL
 Ship To Address: 9205 LAKEVIEW RD
 LAKESIDE, CA 92040
 Phone: 6193902600
 Email: bbeisigl@lsusd.net

LINE	QTY	PART #	DESCRIPTION	UNIT PRICE	EXT PRICE
------	-----	--------	-------------	------------	-----------

1			TIPS Contract #230504		
2					
3			Quote Name		
4			Collaboration Flex Plan - Webex Calling		
4			Billing Frequency		
			Annual		
5			Term		
			60 Months		
6			Start Date		
			TBD		
7			End Date		
			TBD		
8			Autorenewal		
			No		
9					
10	1	A-FLEX-3	Collaboration Flex Plan 3.0		
11	375	A-FLEX-EACL-E	EntW Webex Calling for Education	\$0.00	\$0.00
12	150	A-FLEX-CL-COMMON-E	Webex Calling Workspace for Common Area Add-on for EDU	\$359.29	\$134,733.75
13	9,000	A-FLEX-FILESTG-ENT	File Storage Entitlement	\$203.29	\$30,493.50
14	450	A-FLEX-PROPACK-ENT	Pro Pack for Cisco Control Hub Entitlement	\$0.00	\$0.00
15	450	A-FLEX-C-DEV-ENT	Cloud Device Registration Entitlement	\$0.00	\$0.00
16	450	A-FLEX-C-PRO	Webex Calling Entitlement	\$0.00	\$0.00
17	450	A-FLEX-MSG-ENT	Messaging Entitlement	\$0.00	\$0.00
18	298	A-FLEX-CL-CA	Webex Calling Common Area Entitlement	\$0.00	\$0.00
19	375	A-FLEX-P-CALL	Prem to Webex Calling / UCM Cloud	\$0.00	\$0.00
20	0	A-FLEX-ERC	Emergency Response Center Call fee per location search US	\$0.00	\$0.00
21	1	A-FLEX-EDU-CUST	Education Customer	\$43.00	\$0.00
22	1	SVS-FLEX-SUPT-BAS	Basic Support for Flex Plan	\$0.00	\$0.00

04/04/24
 Confidential

ASPIRE TECHNOLOGY PARTNERS
 25 James Way, Eatontown, NJ 07724 - (732) 847-9600

LINE	QTY	PART #	DESCRIPTION	UNIT PRICE	EXT PRICE
23			SubTotal		\$165,227.25
24					
25			Phone Upgrade		
26	450	CP-7841-3PCC-K9=	Cisco IP Phone 7841 with Multiplatform Phone firmware	\$145.22	\$65,349.00
27					
28	55	CP-8851-3PCC-K9=	Cisco IP Phone 8851 with Multiplatform Phone firmware	\$242.61	\$13,343.55
29					
30	25	CP-8800-A-KEM-3PC=	Cisco 8800 series KEM for Audio IP Phones with MPP firmware	\$204.05	\$5,101.25
31					
32	400	CP-7800-WMK=	Spare Wallmount Kit for Cisco UC Phone 7800 Series	\$49.52	\$19,808.00
33					
34	1	ATA192-3PW-K9	192 Analog Telephone Adapter for MPP with switch	\$100.12	\$100.12
35	1	ATA191-CLIP-NA	Power Clip for ATA191 and ATA192, North America	\$0.00	\$0.00
36			SubTotal		\$103,701.92
37					
38			Aspire Professional Services		
39	234	PS-IPT-SVS3	Aspire Collaboration Professional Services - Design, Configure, Test, Cutover, and Support - Webex Calling - Design, Discovery, and Technical Planning - Configuration - Control Hub, Dial Plan, Calling Site Features, User Features, Phones, etc - RedSky for Ray BAUM Compliance - InformaCast Migration to Fusion - Cutover, Testing, Porting Support - Admin Knowledge Transfer - Post Cutover Support *Client to provide onsite smart hands and deploy phones* *Client to perform all firewall and network changes needed* *Aspire services to be all remote*	\$250.00	\$58,500.00
40	6	CX-JC-TRN	Aspire Customer Success (CX) IP Phone Training - Four (4) Sessions	\$250.00	\$1,500.00
41			SubTotal		\$60,000.00
42					
43			Open Market		
44			Singlewire InformaCast - 5YR		
45	1	SS-CPF-2	One-Time Cloud Provisioning Fee - TIER 2	\$776.47	\$776.47
46	300	SSF-5YR-USR-TIER 2	InformaCast Fusion - Fusion User - 5 Year Subscription	\$56.35	\$16,905.00
47	200	SSF-5YR-EPA-TIER 2	InformaCast Fusion IP Phone Endpoint Add-On Term 5 Years	\$39.42	\$7,884.00
48	400	SSF-5YR-EPA-TIER 2	InformaCast Fusion IP Speaker Endpoint Add-On Term 5 Years	\$39.42	\$15,768.00
49			SubTotal		\$41,333.47
50					
51			RedSky Notification - 5YR		

LINE	QTY	PART #	DESCRIPTION	UNIT PRICE	EXT PRICE
52	1	SP-REDSKY-MRC1 RS-HM-ENH-NOTIFY	Redsky Webex Calling	\$0.00	\$0.00
53	60	RS-HM-ENH-NOTIFY	Horizon Mobility Enhanced Notification per 1K subscribers	\$154.06	\$9,243.60
54			SubTotal		\$9,243.60

SubTotal	\$379,506.24
Sales Tax	\$0.00
Shipping	\$0.00
Total	\$379,506.24

Accepted By (Print Name & Title)

Signature

Date

The information provided to you in this communication is regarded by Aspire Technology Partners, LLC to be Confidential and Proprietary information. This includes the description of the materials/products for sale, the prices quoted, and any description of consulting services to be performed by Aspire Technology Partners, LLC. This information shall not be disclosed or made available to any party unrelated to this agreement without our express written consent. You must also exercise reasonable care to protect this information from the unauthorized disclosure by others.



Service Order Agreement

Tariffed Services & Non-tariffed Services

Company Name: Lakeside Union School District
 Contact Name: Stephen Howard
 Contact Number: 732.847.9553
 Email: showard@aspiretransforms.com

Service Order Number: Quote
 Sales Rep: James Coy
 Date: 3.23.2023

SERVICE SUMMARY: CCP
 Requested Service Date:
 Purchase Order Number:

Term Length: 60 Months
 Services: CCP For WebEx
 Delivery Mechanism: VCCP Trunks

CUSTOMER INFORMATION / SERVICE SITE

Customer Business Name: Lakeside Union School District Main Phone:
 Company Federal ID #: Main Fax:
 Service Address: 12335 Woodside Avenue City: Lakeside State: CA Zip: 92040
 Billing Address: City: State: Zip:
 Bill Options: Paper Email: If multiple locations: One Bill Separate Bi
 For Internal Use Only CAS Number: Site Number

MONTHLY CHARGES

Discription	Cost Per Unit		Quantity	Total
CCP Call Path	\$ 17.00	X	50	\$ 850.00
CCP Telecom Recovery Fee	\$ 3.16	X	50	\$ 158.00
CCP Federal Access Charge	\$ 0.50	X	50	\$ 25.00
CCP DID/Local Number	\$ 0.25	X	200	\$ 50.00
CCP Toll free Number	\$ 1.00	X	0	\$ -
Vfax Lines	\$ 10.00	X	15	\$ 150.00
	\$ -	X		\$ -
	\$ -	X		\$ -
Long Distance (intraLata)	\$ -	X	per minute	
Long Distance (interLata)	\$ -	X	per minute	
Long Distance (800 service)	\$ 0.0095	X	per minute	
Total Monthly Charges:				\$ 1,233.00

INSTALL CHARGES

Discription	Cost Per Unit		Quantity	Total
DID Migration	\$1.00	X	200	\$ 200.00
		X		\$ -
		X		\$ -
Total Install Charges				\$ 200.00

Local Lines: LD Lines: Estimated LD: Total SOA Charges:
 IntraLATA LD Carrier: FDT InterLATA LD Carrier: FDT LD Rate: Unlimited in US and Canada
 Blocking: Toll Int'l 900 411 3rd Party Billing Collect

By signing this order form, Customer agrees to pay all charges incurred on Customer's FirstDigital Telecom's ("FirstDigital") account, including any applicable federal, state, or local use, excise, sales, privilege taxes, duties, or similar liabilities, by the stated due date and to adhere to all of the terms and conditions as set forth at www.firstdigital.com/legal and in FirstDigital's applicable tariffs, if any, and promotional offerings and the terms and conditions included with this Service Order Agreement, which FirstDigital terms and conditions and applicable tariffs are hereby incorporated by reference. Customer also authorizes FirstDigital to obtain any credit information necessary and/or customer proprietary network information, necessary to provision FirstDigital Service and to establish this FirstDigital account, and authorizes release of said information by any and all third parties to FirstDigital. Further, the undersigned represents that he/she is authorized to approve and accept the responsibility of the terms and conditions herein. Customer understands that, pursuant to tariff, number assignments are not guaranteed, and should not be relied on before service is activated. Customer understands there is a charge for changing Preferred (InterLATA and/or IntraLATA long distance Carrier(s)).

Authorized Signature: _____ Title: _____
 Customer Name: _____ Date: _____
 Company Name: _____ Name: _____
 FirstDigital Signature: _____ Date: _____



Lakeside Union School District - Webex Calling

Statement of Work

Prepared For:

Lakeside Union School District

Account Manager:	Bill Hrehowsik
Author:	Stephen Howard Josh Reinmann
Client:	Lakeside Union School District
Solution ID:	30577
SOW Revision 1.3:	Version 1
Date:	April 4th, 2024

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1 Executive Summary

Lakeside Union School District (Hereafter "Client") has requested the professional services of Aspire Technology Partners, LLC (Hereafter "Aspire") to complete the following:

Aspire Technology Partners will implement the Webex Calling cloud-based phone solution at Lakeside Union School District. This SOW will consist of migrating the Client from their existing Cisco premises solution to the cloud-based Webex Calling. This SOW also will migrate the district from Singlewire InformaCast Advanced to InformaCast Fusion.

In order to successfully assist the Client with this endeavor, Aspire proposes assigning a Project Manager, a Delivery Engineer, or other staff resources to work with the Client to achieve the desired goals and objectives for this engagement.

This Statement of Work (Hereafter "SOW") is a part of, and is incorporated into, the terms of the Aspire Master Services Agreement (Hereafter "MSA"), which can be found here:

<https://www.aspiretransforms.com/aspire-technology-partners-llc-master-services-agreement/>.

Aspire's project approach includes a comprehensive implementation methodology, along with structured and repeatable technical processes. We are confident that the approach outlined within this SOW clearly demonstrates that Aspire understands the Client's needs; is highly-qualified to deliver the desired services; has a solid, well-proven approach for performing the work; and is providing reasonable time and effort estimates. Aspire stands out due to our focus on Client satisfaction, commitment to high-quality service, proven experience, Client flexibility, and competitive cost structure.

The Lakeside Union School District - Webex Calling will be provided to the Client as detailed below.

2 Scope

Aspire will involve the appropriate client Stakeholders to ensure they understand the purpose and importance of each Deliverable and Milestone. Additionally, Aspire provides an opportunity for the stakeholders to review and comment on draft documentation as it is prepared in order to ensure the accuracy and completeness of each Milestone of this engagement. The scope of the project will comprise of the following:

- Webex Calling Flex Subscription
 - Four hundred and fifty (450) Professional User Licenses
 - Two hundred and ninety-eight (298) Workspace Licenses
- IP Endpoints
 - Four hundred and fifty (450) Cisco IP Phone 7841
 - Fifty-five (55) Cisco IP Phone 8851
 - Twenty-five (25) Cisco Phone 8800 Key Expansion Module
 - One (1) Cisco ATA 192
 - Four hundred (400) Cisco 7800 Wall Mount Kits
- Cloud Connected PSTN - Veracity / First Digital
 - Fifty (50) Concurrent Call Paths CCP
 - Fifteen (15) eFax Numbers
 - Two hundred (200) DIDs
- Enhanced Emergency Calling for Webex Calling (RedSky) E911
 - Five hundred and five (505) IP Phones

- RedSky Enhanced Notification
 - Up to Five hundred and five (505) subscribers
- Singlewire InformaCast Fusion Migration from Advanced
 - Three hundred (300) Fusion User Licenses
 - Two hundred (200) IP Phone Endpoint Licenses
 - Four hundred (400) IP Speaker Endpoint Licenses

2.1 Locations, Services and Quantities

The full scope of work for this project is described as a combination of location and specific tasks to be completed. Each location is defined in the tables in this section. The site names defined in Table 1 will be referenced throughout the document.

The following locations are included within this project:

Table 1

Site Name	Address
District Office	12335 Woodside Avenue, Lakeside CA 92040
Lakeside Middle School	11833 Woodside Avenue, Lakeside CA 92040
Tierra Del Sol	9611 Petite Lane, Lakeside CA 92040
Lakeside Farms Elementary School	11915 Lakeside Avenue, Lakeside CA 92040
Lakeview Elementary School	9205 Lakeview Road, Lakeside CA 92040
Lemon Crest Elementary School	12463 Lemon Crest Drive, Lakeside CA 92040
Lindo Park Elementary School	12824 Lakeshore Drive, Lakeside CA 92040
Riverview International Academy	9308 Winter Gardens Boulevard, Lakeside CA 92040
Winter Gardens Elementary School	8501 Pueblo Road, Lakeside CA 92040
Dream Academy	11838 Valle Vista Road, Lakeside CA 92040
LEAPP Preschool	9745 Marilla Drive, Lakeside CA 92040
Transportation	9707 Marilla Drive, Lakeside CA 92040
Lakeside NOC	9700 Riverview Avenue, Lakeside CA 92040

The name and quantity of each service is displayed in the tables below. A full description of each service is listed in the section 3.1 in this document.

District Office

Service	Qty
Site Configurations	1
End User Configurations	48
Device Configurations	48
Hunt Groups	2
Auto Attendant Configurations	1
e911 ERL/ELIN Configurations	12
e911 Site Definition	1
Site Configurations	1
End User Configurations	18
Device Configurations	18
Auto Attendant Configurations	1
e911 Site Definition	1
Hunt Groups	2
e911 ERL/ELIN Configurations	6

Lakeside Middle School

Service	Qty
Site Configurations	1
End User Configurations	57
Device Configurations	57
Hunt Groups	2
Auto Attendant Configurations	1
e911 ERL/ELIN Configurations	12
e911 Site Definition	1

Tierra Del Sol

Service	Qty
Site Configurations	1
End User Configurations	63
Device Configurations	63
Hunt Groups	2
Auto Attendant Configurations	1
e911 ERL/ELIN Configurations	12
e911 Site Definition	1

Lakeside Farms Elementary School

Service	Qty
Site Configurations	1
End User Configurations	60
Device Configurations	60
Hunt Groups	2
Auto Attendant Configurations	1
e911 Site Definition	1
e911 ERL/ELIN Configurations	12

Lakeview Elementary School

Service	Qty
Site Configurations	1
End User Configurations	53
Device Configurations	53
Hunt Groups	2
Auto Attendant Configurations	1
e911 Site Definition	1
e911 ERL/ELIN Configurations	12

Lemon Crest Elementary School

Service	Qty
Site Configurations	1
End User Configurations	50
Device Configurations	50
Hunt Groups	2
Auto Attendant Configurations	1
e911 Site Definition	1
e911 ERL/ELIN Configurations	12

Lindo Park Elementary School

Service	Qty
Site Configurations	1
End User Configurations	48
Device Configurations	48
Hunt Groups	2
Auto Attendant Configurations	1
e911 Site Definition	1
e911 ERL/ELIN Configurations	12

Riverview International Academy

Service	Qty
Site Configurations	1
End User Configurations	46
Device Configurations	46
Hunt Groups	2
Auto Attendant Configurations	1
e911 ERL/ELIN Configurations	12
e911 Site Definition	1

Winter Gardens Elementary School

Service	Qty
Site Configurations	1
End User Configurations	27
Device Configurations	27
Hunt Groups	2

Lakeside Union School District - Webex Calling
Statement of Work



Auto Attendant Configurations	1
e911 Site Definition	1
e911 ERL/ELIN Configurations	12

Dream Academy

Service	Qty
Site Configurations	1
End User Configurations	11
Device Configurations	11
Hunt Groups	2
Auto Attendant Configurations	1
e911 Site Definition	1
e911 ERL/ELIN Configurations	6

LEAPP Preschool

Service	Qty
Site Configurations	1
End User Configurations	18
Device Configurations	18
Hunt Groups	2
Auto Attendant Configurations	1
e911 Site Definition	1
e911 ERL/ELIN Configurations	6

Transportation

Service	Qty
Site Configurations	1
End User Configurations	6
Device Configurations	6
Hunt Groups	2
Auto Attendant Configurations	1
e911 ERL/ELIN Configurations	6
e911 Site Definition	1
Site Configurations	1
End User Configurations	18
Device Configurations	18
Hunt Groups	2
Auto Attendant Configurations	1
e911 Site Definition	1
e911 ERL/ELIN Configurations	6

Lakeside NOC

Service	Qty
Collaboration Infrastructure Design Workshops	1
Control Hub	1
PSTN	1
RedSky E911	2

Lakeside Union School District - Webex Calling
Statement of Work



Singlewire InformaCast Fusion	1
Site Design Workshops	2
Webex Control Hub	1
Domain Claim	1
Import Users and Assign Licenses	1
Single Sign-on (SSO)	1
Organization Settings	1
Webex Calling	1
Create Locations	1
Dial Plan Configuration	1
Cloud Connected PSTN	1
Concurrent Call Path	1
DIDs	1
eFax Service	1
RedSky E911	1
Create Organization and Admins	1
Webex Calling Integration	1
Import Wire Maps	1
InformaCat Fusion Integration	1
Singlewire InformaCast Fusion Migration	1
Deploy Fusion VMs	1
Webex Calling Integration	1
Migration Tool and Manual Configuration	1
Endpoint Registration	1
Site Configurations	1
End User Configurations	16
Device Configurations	16
Hunt Groups	1
Auto Attendant Configurations	1
e911 ERL/ELIN Configurations	6
e911 Site Definition	1
Knowledge Transfer and Post-Deployment Support	1
Knowledge Transfer	1
Post-Deployment Support - Remote Eng	1
Post-Deployment Support - Remote PM	1
Collaboration End User Training	1

3 Deliverables

3.1 Services Description

This section describes the services listed in the tables in section 2.1 Locations, Services and Quantities. Unless otherwise noted, all items not explicitly listed below are out of scope.

Collaboration Infrastructure Design Workshops

Aspire will conduct design sessions to cover all of the applications listed in this SOW. Aspire will create a low-level design (LLD) document as an output of these design sessions. Client will be required to sign off on the LLD prior to the commencement of the execution phase of the project.

Control Hub

Requirements and data gathering including:

- Planning and Design Workbook
- Key sheets for users, phones, extensions, DIDs, etc.
- Network documentation of Voice VLAN, QoS, firewall port requirements, LDAP, email, etc.

PSTN

Review of the new PSTN for this project.

RedSky E911

RedSky planning template documents for Client to complete.

Singlewire InformaCast Fusion

Review existing configuration and design session to confirm Distribution Lists, Device Groups, Alerts, Notifications, and Bells Schedulers.

Site Design Workshops

Aspire will hold design sessions for each site included in this SOW. Each design session will focus on the site-specific requirements and data gathering including:

- End User requirements
- Device information
 - User phones
 - Common area phones
 - Analog devices

- Voicemail requirements
- e911 requirements

Webex Control Hub

Aspire will design and configure the Webex Control Hub. Control Hub will manage all of the Webex services, users, provisioned devices, and allow for a detailed view of analytics and reporting.

Domain Claim

Verify / Claim Domain(s)

Import Users and Assign Licenses

Import users via .CSV or Directory Connector. Configure license assignment template or group-based management license template for up to three (3) groups

Single Sign-on (SSO)

Configure SSO with identity provider (IdP)

Organization Settings

System-level configurations for Control Hub.

Webex Calling

Aspire will design and deploy Webex Calling. The Control Hub will be configured with Webex Calling features to provide the Client with enterprise-grade calling and feature set.

Create Locations

Up to thirteen (13) locations.

Dial Plan Configuration

Dial Plan settings, call routing, and service settings.

Cloud Connected PSTN

Cisco interconnects with authorized PSTN providers to enable reliable PSTN in the cloud, without the need for any premises-based gateway. Aspire is proposing First Digital as the Cloud Connected PSTN (CCP) provider for this scope.

Concurrent Call Path

Up to fifty (50) CCP for Webex Calling.

DIDs

Up to (200) DID/Local Numbers.

eFax Service

Up to fifteen (15) eFax Numbers. Numbers to be ported to the carrier for fax. The Client must supply First Digital with emails for outbound users.

RedSky E911

Design and configure RedSky (E911) for compliance with Kari's Law and RAY BAUM's Act. RedSky is a national E911 emergency call provider for the Webex Calling deployment that provides the ability to send the emergency call to the appropriate PSAP.

Create Organization and Admins

Use the Webex Calling subscription to enable the RedSky Organization build and licenses.

Webex Calling Integration

Enable RedSky E911 service at the organization level and the individual locations within Webex.

Import Wire Maps

Maintains the Client provisioned database that is used to map an emergency call to a dispatchable location

InformaCast Fusion Integration

This will allow the details of the emergency call, such as location information, to also be delivered as an InformaCast Fusion notification.

Singlewire InformaCast Fusion Migration

Design and configure a migration from the existing deployment of InformaCast Advanced to InformaCast Fusion. Fusion will allow for the continuation of alerts and paging to the existing premises devices along with adding management from the cloud and cloud enabled alerts and targets.

Deploy Fusion VMs

Aspire to configure two (2) Fusion VMs for InformaCast High Availability

Webex Calling Integration

Register the InformaCast servers as a line-side SIP endpoint to Webex Calling. This registration gives InformaCast an extension in the dialplan and allows other phones to call it for Dialcast

Migration Tool and Manual Configuration

Use InformaCast Migration tool to move over all existing configurations possible with the tool and manual re-configuration of features not migrated with the tool.

Endpoint Registration

Register all IP phones, IP Speakers, IP Zone Controllers, and other IP endpoints.

Site Configurations

Each site requires specific design and configurations to ensure it is properly deployed. The following items are included in the data gathering and Executing Phase of deploying each site: - Site-specific configurations for all applications included in this SOW:

- End users
- Phones - including physical devices and soft phones
- Key expansion modules
- Analog gateways
- Voicemail Configurations
- e911 configurations

End User Configurations

Configure users for calling

Device Configurations

Configure user devices and common area devices

Hunt Groups

Hunt groups provide basic routing functionality to groups of directory numbers. Features include queuing, multiple hunting algorithms and multiple groups of directory numbers.

Auto Attendant Configurations

The Auto Attendant ensures calls are answered by configuring greetings, menus, and call routing to a hunt group, a voicemail box, or a user. Schedules can be configured for time of day call handling.

e911 ERL/ELIN Configurations

Configure the required ELIN's and ERL's for each site.

e911 Site Definition

Up to thirteen (13) sites.

Knowledge Transfer and Post-Deployment Support

Aspire will provide remote post-deployment support for specified number of days. Unless otherwise specified, all support will be performed during business hours.

Knowledge Transfer

Perform up to ten (10) hours of Technology Mentoring and Knowledge Transfer for Collaboration Infrastructure solutions during two (2) business days.

Post-Deployment Support - Remote Eng

Provide First Day in Service (FDIS) up to eight (8) hours of remote support

Collaboration End User Training

Aspire will develop and deliver End User Training to include:

- Up to four (4) one-hour remote training sessions on IP Phones during two (2) business days

3.2 Milestones

The following deliverables are subject to change and may not be delivered in all cases:

- Documented results from UAT and SAT testing
- Project closure documentation and diagrams

4 Client Responsibilities

The client will have the following responsibilities towards the completion of the work outlined in the Statement of Work:

- Client will make available all personnel and information required to complete the design sessions. Client will ensure all information is accurate - and delivered in a timely manner.
- Notifying all Client stakeholders including impacted Client employees, agents, contractors and third parties of the implementation plans and schedules
- Provide onsite smart hands for the duration of the project to include:
 - Rack and cable hardware
 - Test and reboot phones as needed
 - Assist with testing onsite components
- Installing and cable new phones
- Providing existing PBX data (Users/Extensions/AA etc.) in standard Aspire key sheet format within a minimum of fifteen business days prior to cutover
- Purchasing required PSTN, TN/DIDs, ISP, and other network and voice circuits and services in order to support this project.
- Identifying and providing rack space, power, and cabling for the equipment
- Providing required network interface ports and Power over Ethernet (PoE) in support of this solution
- Providing network cabling, analog cabling, and patch cabling in order to support this solution.
- Deploying all mobile and desktop clients to end users.
- Procuring, purchasing and/or configuring all network and firewall services needed to support this project (specific requirements to be provided by Aspire).
 - Voice VLANs
 - Firewall requirements to support Webex Calling
 - Routing and switching changes to support Webex Calling
- Client to perform the physical discovery and wire map creation for RedSky at each location. Each device must be mapped to a network element, such as IP subnet, network switch, or access point.

- Client to populate templates for importing the needed information including Buildings, Locations, Device Users, IP Range Assignment, BSSID Assignment, and LLDP Chassis and Port Assignment (if applicable)

5 Out of Scope

Any work not outlined in this statement of work will be considered Out of Scope. Specific items explicitly called out as out of scope may be outlined below:

- Any services not expressly listed in this Statement of Work.
- Integration of other systems or devices not specified including intercoms and other physical security devices.

6 Key Assumptions

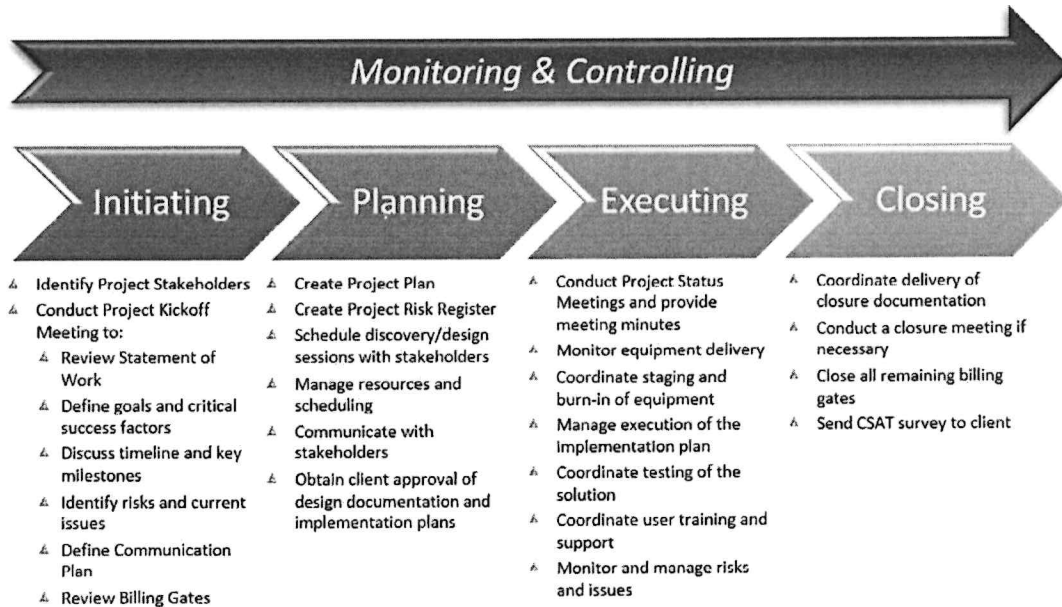
In order to ensure the work outlined within this SOW will be performed successfully, the following key assumptions are agreed to by both parties:

- Full VPN access to the Client's environment is mandatory for successful completion of this project. If working sessions need to be performed via other means such as WebEx or Zoom, a change order will be issued and will incur additional charges as this requires additional time and effort to coordinate.
- Review and collect documentation and configurations from the existing Collaboration Infrastructure remotely via VPN access. If working sessions need to be performed via other means such as WebEx or Zoom, a change order will be issued and may incur additional charges as this requires additional time and effort to coordinate
- NOTE: Full VPN access to the Client's environment is mandatory for successful completion of this project.
- The Webex Calling subscription start date is TBD. The subscription must start in order to configure the Control Hub for Webex Calling. The subscription does not start at go live or port date.
- Contract for PSTN services will be direct between the Client and Carrier. Invoices will be billed monthly.
- Client will purchase needed ELIN/DID from the Carrier.
- If the Client requests to test via 911 instead of 933, charges up to \$100 per call could occur from RedSky if 911 testing fails to send the proper location.
- Fusion requires a premises based virtual machine to be supplied by the Client.

- Fusion works differently with Webex Calling vs Communications Manager so features should not be assumed.
- Maintaining an active maintenance and software support contract with existing PBX vendor for the duration of this project
- Maintaining or purchasing needed hardware or software maintenance and Smart Net for support that may be required from Cisco TAC
- Shipping and shipping costs of hardware, including phones, that need to be sent to its final installation location.

7 Project Management Methodology:

Aspire's recommended project approach consists of the following phases, which will be managed by the Aspire Project Manager ("PM"). The PM will be the single point of contact for all interactions with Client and Client's other vendors.



7.1 Initiating

During this phase, the Aspire PM is focused on kicking off the project. They will gather and verify the information required to successfully plan and execute the client-approved Statement of Work.

The following activities will be performed during this phase of the project.

- Identify all Project Stakeholders
- Conduct the Project Kickoff Meeting to:
 - Identify and secure supporting Client resources

- Review the project Statement of Work (SOW)
- Define project goals and critical success factors
- Discuss the project timeline and key milestones
- Identify project risks and current issues
- Define the Project Communication Plan
- Review the agreed upon Project Billing Gates

7.2 Planning

During this phase, the Aspire PM focuses on planning the project. They manage the definition of the project requirements and the creation of detailed design documentation in collaboration with the Client, Aspire Engineers, and vendors.

The following activities will be performed during this phase of the project:

- Conduct Project Status Meetings and provide meeting minutes
- Create the Project Plan
- Create the Project Risk Register
- Schedule discovery/design sessions with stakeholders, Aspire Engineers, and vendors
- Manage project resources and scheduling
- Communicate with stakeholders
- Obtain client approval of detailed design documentation and implementation plans

7.3 Executing

During this phase, the Aspire PM focuses on the execution of the Project Plan based on the approved design and implementation plans from the Planning Phase.

The following activities will be performed during this phase of the project:

- Conduct Project Status Meetings and provide meeting minutes
- Monitor equipment delivery
- Coordinate the staging and burn-in of equipment
- Manage the execution of the implementation plan
- Coordinate testing of the solution
- Coordinate user training and support
- Monitor and manage project risks and issues
- Manage project resources and scheduling

7.4 Closing

During this phase, the Aspire PM is focused on closing the project.

The following activities will be performed during this phase of the project:

- Coordinate the delivery of closure documentation
- Conduct a closure meeting if necessary
- Close all remaining billing gates
- Send CSAT survey to client

8 Change Management Process

Any change of the Scope of service, additional services, or modification of the responsibilities of the parties under this SOW shall be set forth in a mutually agreed Change Request approved in writing by both Client and Aspire ("Change Request" a sample form attached as Appendix 1). The Change Request will describe the nature of the change, the reason for the change, the effect of the change on the scope of work, modification of Deliverables and/or the schedule, and any additional pricing.

Once all Deliverables associated with the original SOW have been provided to Client, Aspire reserves the right to close the SOW if a Change Request has not been executed.

9 Client Requirements & Assumptions

The following Client requirements and assumptions must be met throughout the engagement. These requirements facilitate a successful deployment of this project and attainment of the stated activities and deliverables in this SOW. If these requirements are not met, delays and/or additional costs may be incurred by Client. The costs and project schedule described in this document are based on the following:

1. Standard work week and hours of operation are between the hours of 8 AM to 6 PM Eastern time Monday through Friday excluding weekend days and Aspire observed holidays. Unless expressly agreed upon in writing, all work will be performed during these normal business hours. It is the responsibility of Client to notify the Aspire Project Manager if after hours or weekend work is desired. This will be subject to the upcharges detailed below and subject to engineer availability:
 - After hours (Mon – Thurs, 6PM – 8AM Eastern)
and Weekends (Fri 6 PM - Mon 8AM Eastern) 25%
 - Aspire holidays (*Based on availability) 50%

Aspire will provide a list of holidays upon request.

2. All onsite services are based on a minimum one-day engagement. Unless otherwise noted in the SOW, a day of service is defined as eight (8) hours per resource delivered during normal business hours. All remotely performed services are based on a minimum quarter hour engagement. Requests for service outside of the normal business hours, are subject to the uplifts defined above.
3. Aspire will make commercially reasonable efforts to meet the requested installation date, however, unforeseen circumstances including, but not limited to product availability delays, delays in obtaining required data and technical information necessary to configure equipment, Client's failure to timely perform Client's responsibilities may cause a delay in the installation schedule.
4. Client agrees to notify Aspire at least two (2) business days prior to the scheduled work commencement date if the premises will not be ready for Aspire or if Client is unable to prepare the premises by the scheduled date of delivery. Client shall be responsible for any costs associated with such delays. Client understands that such delays will cause Aspire to reschedule installation at a later date based on availability of Aspire resources.
5. Client will ensure products covered under this Agreement are insured against loss or damage during the staging process of the project.
6. Client will be responsible for securing equipment onsite for the duration of the Project.
7. If the proposed solution includes circuits (WAN, ISP or PSTN), the following applies:
 - Client shall order, install and test all circuits specified in the Solution Design documentation prior to the scheduled implementation date and ensure Telco demarcation circuit identifications are clearly identified and extended to the final connection location.

- If the Scope explicitly identifies Aspire as responsible for supporting circuit turnups, testing and ports, Aspire reserves the right to bill for services exceeding four (4) hours per circuit installation.
 - Client will notify Aspire within two (2) business days if the circuits will not be completely ready by the scheduled implementation date. Implementation will then be rescheduled once circuits are live and tested based on availability of Aspire resources. Any expenses incurred by Aspire will be passed to Client.
8. During onsite implementations, If Client does not meet the requirements and the implementation must be rescheduled, Client will be charged for one (1) business day per resource.
 9. Unless otherwise agreed to by the parties, Client agrees to respond within two (2) business days for the below requests from Aspire. Any delays beyond two (2) business days may result in Project delays or putting the Project on hold.
 - Requests for Client information or documentation
 - Requests for review of Project deliverables. If no response is received within the specified timeframe, Aspire will assume the documentation is acceptable
 10. Client agrees to provide feedback within five (5) business days of receiving the Project closure documentation. If no response is received within the specified timeframe, Aspire will assume the documentation is acceptable and the project will be closed.
 11. If a Project is put on hold based on Client request or project requirements not being met by Client, Aspire reserves the right to bill for any unbilled work performed and/or delays caused by restarting a project that was placed on hold by Client. Client understands that such delays will cause Aspire to reschedule the project at a later date based on availability of Aspire resources.
 12. Time spent on the Project by Client resources is not included in the costs presented in this SOW.
 13. Unless explicitly identified in the Scope, this SOW does not include time and material costs for Aspire resources to travel beyond the local service area (Eastern PA, NJ, and NY). If work is required at the Client location(s) outside of the local service area, travel time, in quarter-hour increments, will be charged to Client. Expenses incurred by Aspire in providing services, including but not limited to travel, lodging, if necessary, per diem meals, and mileage, will be charged to Client at Aspire's cost.
 14. All onsite work will be coordinated with the appointed Client representative before the commencement of any onsite activities.
 15. It is the responsibility of Client and its personnel to notify the Aspire Project Manager if the services being provided have any impact on Client's production environment.
 16. Client agrees to provide Aspire with required Administrative/User access to the computer systems to be configured during this engagement.
 17. Client is responsible for the ongoing support and/or enhancements of any work delivered as part of this engagement.

18. Client will provide all patch cables (RJ45, Fiber, etc.) required.
19. Client will designate a main point of contact for the duration of the project. The individual in this role is responsible for resolving and/or escalating issues outside the control of Aspire, identifying Client support resources for Aspire, and signing off on all Aspire deliverables.
20. Client will identify and assign client subject matter experts crucial for the execution and completion of the project. The Client subject matter experts will make themselves available for interviews, discussions, requirements gathering, and Deliverable reviews throughout the project.
21. Client will provide at least one technical contact with system administration responsibilities and the appropriate levels of system access and technical information necessary to perform the services stated in this SOW.
22. Client will provide and coordinate all appropriate Client resources and vendors required to deliver the solution within this SOW.
23. Client will provide and coordinate all support efforts on third-party systems required to be integrated with the solution within this SOW.
24. Client will be responsible for licensing, hardware and software support contracts for all products and services included within this SOW.
25. Client will send requests to the Aspire Project Manager to schedule Aspire resources a minimum of five (5) business days in advance.
26. Client will provide and/or be responsible for the necessary facilities and documentation for the implementation, including:
 - Rack space and power requirements have been properly allocated
 - Racks for all equipment are adequately grounded
 - Adequate air ventilation/cooling of all hardware
 - Electrical power requirements for new and/or re-provisioned equipment, including circuits and UPS units, have been provided
 - Network requirements for the equipment to be installed as part of this SOW including, but not limited to: IP addressing, VLANs, switch ports, etc.
 - Existing DNS and DHCP server configuration information if applicable
 - All network documentation (Visio Diagrams, Configurations, etc.) available for the current systems and processes
 - Remote network access for authorized Aspire resources to the systems in Scope for the duration of the Project
27. The Client's network architecture design shall not change between the kickoff and the completion of all services outlined in this SOW.
28. Aspire reserves the right to bill for services delivered to complete assignments outside of this SOW. Aspire will not perform any such services without first obtaining written approval from the authorized Client representative. (See Change Management Process Section 5) The following are not deemed part of the Scope unless otherwise specified in this SOW:

- Any customization of, or labor to install, software (except pre-installed software purchased with the product) on systems not expressly deemed as part of the initiative
- Support or replacement of product that is altered, modified, mishandled, destroyed or damaged by natural causes or damaged due to a negligent or willful act or omission by Client and its personnel or use other than as specified in the applicable Aspire-supplied documentation
- Services to resolve incompatibility issues resulting from integration with third-party software/hardware or causes beyond Aspire's control (e.g., System Deficiencies with Cisco firmware/software, UCM, Contact Center Products, etc.)

10 Project Fees

All work will be performed on a **project basis**. We will work closely with the Client to make the best business decisions regarding the schedule.

Description	Fees
Lakeside Union School District - Webex Calling	\$58,500.00

***Aspire typically requires 4 - 6 weeks notice after Client has signed the SOW to start the Project.

Payment terms will be Net 30 days from the date the Milestones are met and/or Deliverables are received by Client. Payment schedule will conform to the following schedule:

Milestone Description	Fee (Percent of Total)
Completion of Project Kickoff (30%)	\$17,550.00
Completion of Milestone 1 – Solution Design (30%)	\$17,550.00
Completion of Milestone 2 – Phone Deployment Completed (30%)	\$17,550.00
Completion of Project (10%)	\$5,850.00

The fees provided in this SOW shall be valid for up to sixty (60) days from the original date this SOW was issued. If the contract has not been awarded within sixty (60) days, pricing is subject to change.

If a project is put on hold based on Client request or project requirements not being met by the Client, Aspire reserves the right to invoice for any unbilled worked performed up until the date the project was placed on hold.

Any monies past 90 days due to Aspire, will result on projects/work to be stopped and the account will be placed on hold. Customer must be up to date on all payments to Aspire. Customer must pay as per milestone terms.

11 Engagement Acceptance

Signatures on this SOW serve in lieu of a purchase order and indicate that the SOW has been accepted and agreed to by Aspire and Client. The parties hereby acknowledge that they have read and understand this agreement, all attachments hereto, and agree to all terms and conditions stated herein. The parties consent to use of facsimile, electronic and/or digital signatures in the execution of this SOW and the same shall be binding upon the parties as if they were an original signature.

Accepted and agreed by:

Lakeside Union School District

Represented by:

Print

Signature

Date

Aspire Technology Partners, LLC.

Represented by:

Print

Signature

Date

The Interlocal Purchasing System

Purchasing Made Personal



Printed 26 April 2024

www.aspiretransforms.com



Aspire Technology Partners LLC

EMAIL PO & VENDOR QUOTE TO: TIPSPO@TIPS-USA.COM PO AND QUOTE MUST REFERENCE VENDOR TIPS CONTRACT NUMBER ATTACH PO AS A PDF - ONLY ONE PO (WITH QUOTE) PER ATTACHMENT

	<u>PAYMENT TO</u>	<u>TIPS CONTACT</u>
ADDRESS	25 JAMES WAY	NAME Charlie Martin
CITY	EATONTOWN	PHONE (866) 839-8477
STATE	NJ	FAX (866) 839-8472
ZIP	07724	EMAIL tips@tips-usa.com

DISADVANTAGED/MINORITY/WOMAN BUSINESS ENTERPRISE: N **HUB: N**

SERVING STATES

AL | AK | AZ | AR | CA | CO | CT | DE | DC | FL | GA | HI | ID | IL | IN | IA | KS | KY | LA | ME | MD | MA | MI | MN | MS | MO | MT | NE | NV | NH | NJ | NM | NY | NC | ND | OH | OK | OR | PA | RI | SC | SD | TN | TX | UT | VT | VA | WA | WI | WY | PR

Overview

Aspire is a premier technology services firm specializing in the delivery of digital infrastructure solutions and managed services in the areas of Enterprise Networking, Collaboration, Wireless Networking, Cyber Security, Data Center, IoT and Cloud. Aspire designs solutions that produce transformative experiences for your organization's users and customers. A unique combination of industry-leading expertise, flexibility, and customer-first values are what sets Aspire apart. The result is a differentiated customer experience which cultivates strong long-term relationships with our clients.

AWARDED CONTRACTS "View EDGAR Doc" on Website

Contract	Comodity	Exp Date	EDGAR
230504	Information Technology Equipment, Software, and Services	07/31/2028	See EDGAR Certification Doc.

CONTACTS BY CONTRACTS

230504

ROBIN SCHMIDT	RFP SPECIALIST	(732) 847-9562	teamaspire@aspiretransforms.com
RACHEL WOMACK	DIRECTOR OF	(732) 847-9641	teamaspire@aspiretransforms.com



A Department of Education Service Center Region 8, 4845 US Highway 271 North, Pittsburg, Texas 75686, (866) 839-8477

To: All TIPS Members

Re: TIPS Federal Funds Disclaimer and Information Sheet

To whom it may concern:

You have clicked on a link or otherwise sought to determine whether a specific TIPS Vendor on a specific TIPS Contract is EDGAR compliant. If the website states “No” to EDGAR compliance for that specific Vendor Contract, then the specific TIPS Vendor on that specific TIPS Contract is **not EDGAR compliant**. If the website states “View Doc” to EDGAR compliance and you are linked to this letter, then TIPS has ensured the specific TIPS Vendor’s compliance with 2 CFR 200 on the specified contract *to the extent a cooperative can do so*, as described below.

Region 8 Education Service Center (Region 8 ESC) is a Texas Education Service Center which operates The Interlocal Purchasing System (TIPS), a purchasing cooperative and department of Region 8 ESC. This document certifies that Region 8 ESC and TIPS made every effort to comply with the most restrictive requirements of 2 CFR 200, identified for educational purposes as the Education Department General Administrative Regulations (“EDGAR”). Please note that federal funds not sourced from the US Department of Education are likely regulated by 2 CFR 200 but are not technically “EDGAR.” Each federal agency and its corresponding state “pass-through” agency may interpret 2 CFR 200 differently. TIPS certifies that it competitively procures all awarded contracts pursuant to § 44.031 of the Texas Education Code, or Texas Government Code § 2269, as applicable, the most restrictive procurement method, and performs the most restrictive procurement method required by law and regulation, including all of the necessary steps outlined in 2 CFR 200, except the Price or Cost Analysis for purchases of \$250,000 and greater. (See below). **This letter certifies that the Vendor agreed to those 2 CFR 200 contract provisions for the specified contract.**

However, this TIPS certification cannot relieve Members of federal requirements that cannot reasonably be performed by cooperatives. For example, 2 CFR 200 requires a cost or price analysis for purchases over \$250,000.00, a threshold adopted by TEA and the US Dept. of Education. TIPS does not perform a formal cost or price analysis because TIPS is not the entity making the actual purchase of goods or services. If a Vendor is awarded then TIPS has determined that the pricing is within the competitive range for the Vendor’s offering. However, when required by law, the TIPS Member must perform the required analysis on the specific goods or services before seeking TIPS pricing/purchasing from the TIPS Vendor and then upon completion of the purchase process.

Additionally, due to the Texas Department of Agriculture Guidance ARM Section 17 (“ARM Section 17”), relating to Federal Child Nutrition Program Funds (Primarily Texas Public School Fund 240), requirement that all solicitations include specific quantities of goods or services purchased, TIPS Contracts are not in compliance with ARM Section 17 as a **stand-alone** purchase contract. This is because TIPS has no way of predicting which Members will purchase specific quantities of goods and services. However, for Federal Child Nutrition Fund purchases in which the ARM Section 17 required cost or price analysis has been performed by the Member, TIPS contracts may be used in conjunction with the Member’s three quote process **unless labeled with “No” as to EDGAR compliance**. See also ARM Section 17.84 addresses purchasing through a **“Third Party Cooperative that does not follow USDA Procurement Regulations”**. This will include TIPS and possibly other cooperatives that do not specify the exact quantities and line items procured by the cooperative. See the latest ARM Section 17 [here](#).

If this letter was linked or provided in relation to a specific Vendor Contract then the Vendor has agreed to the 2 CFR 200 Contract provisions. For our Members’ benefit, we encourage you, when expending federal funds, to make certain that you understand and comply with any other 2 CFR 200 requirements that cannot necessarily be met on your behalf by a cooperative. We also encourage you to incorporate all 2 CFR 200 TIPS Contract provisions agreed to by the Vendor into all supplemental agreements you enter into with the TIPS Vendor, if any. While TIPS works very hard to ensure legal purchasing compliance on Members’ behalf TIPS does not provide legal counsel to its Members. TIPS recommends that you consult your legal counsel when executing contracts with TIPS Vendors. TIPS reserves the right to change its process as necessary in relation to updated guidance. Thank you for being a Member of TIPS and for letting us assist with your procurement needs.

Request for Taxpayer Identification Number and Certification

**Give Form to the
requester. Do not
send to the IRS.**

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. Aspire Technology Partners, LLC	
2 Business name/disregarded entity name, if different from above	
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input checked="" type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ <u> P </u> <small>Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.</small> <input type="checkbox"/> Other (see instructions) ▶	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>
5 Address (number, street, and apt. or suite no.) See instructions. 25 James Way	Requester's name and address (optional)
6 City, state, and ZIP code Eatontown, NJ 07724	
7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number	
OR	
Employer identification number	
4	2
-	1
6	2
8	9
1	6

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶	Date ▶ <u>Jan 4, 2024</u>
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)
Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. First Digital Communications, LLC	
	2 Business name/disregarded entity name, if different from above FirstDigital Telecom	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input checked="" type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ <u>C</u> <small>Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.</small> <input type="checkbox"/> Other (see instructions) ▶	
	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>	
	5 Address (number, street, and apt. or suite no.) See instructions. 357 S. 670 W., Suite 300	Requester's name and address (optional)
	6 City, state, and ZIP code Lindon, UT 84042	
	7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number	
[] [] [] - [] [] - [] [] [] []	
or	
Employer identification number	
8 7 - 0 6 6 9 2 0 6	

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶ 	Date ▶ <u>5/4/2022</u>
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (Interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

TIPS 230504 Information Technology Equipment, Software, and Services	ASPIRE TECHNOLOGY PARTNERS, LLC
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TIPS PRICING FORM 1 - GOODS/ITEMS PRICING

TIPS permits Vendors to utilize either or both of the two goods/items pricing proposal options (and sub-options) identified below with the "Discount-Off Catalog" option being much more optimal than the "Cost-Plus Markup Option." Vendor is welcome to propose either or both options, and with either option Vendor is able to update their pricing and add/remove items during the life of the contract to ensure that all items listed, whether by description, product number, SKU, UPC or other, fall within the scope of this solicitation category. Please read the "Vendor Pricing Submission" portion of the TIPS form before submitting questions about this form to TIPS.

Option 1 - Discount-Off Catalog Method

This goods/items pricing proposal method is highly preferred over the "Cost-Plus Markup Method" because it is versatile and allows Vendor to efficiently add and update its goods/items pricing without the need to prohibit federal fund purchases. Vendor is asked in the attribute questions within the eBid System to propose a minimum discount off of their catalog pricing. Any discount from 0% to 100% is acceptable. Under this pricing proposal method, Vendor is permitted to provide its "Catalog Pricing" to TIPS in a number of ways, described in Section "A" and Section "B" below. Vendor's minimum discount is 0%. TIPS "Catalog Pricing" provided herein.

SECTION "A" - Providing "Catalog Pricing" through Line-Item Pricing

If Vendor desires to list the "catalog pricing" of goods/items that you sell by line-item, you are welcome to do so here in Section "A" of Pricing Form 1. You are welcome to modify the column headers to better describe the items. TIPS can identify the item's name and "catalog price." Please note that if you are awarded with this type of pricing submission, you will be able to update the pricing and add/remove items without the need to honor any applicable discounts originally proposed. Specific discounts offered for any brand or item must be honored for the life of the contract.

Product Name	Product #	Description	Units description - (each, dozen, hour, day, etc)	MSRP or Catalog Pricing
Example 1: Widget A	12345AB	gadget part	each	\$100.00
Example 2: All Acme Product Line	see Acme catalog located at www.Acme.com	All Acme products available from our company		see Acme catalog located at www.Acme.com
Example 3: All Acme Product Line	Catalog pricing to be provided upon request	All Acme products available from our company		Catalog pricing to be provided upon request

Insert Line-items below this line. You may add cells as needed.

Product Name	Product #	Description	Units description - (each, dozen, hour, day, etc)	MSRP or Catalog Pricing
ALL VERKADA PRODUCT LINE		ALL VERKADA PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
ALL CISCO PRODUCT LINE		ALL CISCO PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
ALL VMWARE PRODUCT LINE		ALL VMWARE PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
ALL NUTANIX PRODUCT LINE		ALL NUTANIX PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
ALL HPE PRODUCT LINE		ALL HPE PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
ALL NETAPP PRODUCT LINE		ALL NETAPP PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
ALL COHESITY PRODUCT LINE		ALL COHESITY PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST

ALL PURE STORAGE PRODUCT LINE		ALL PURE STORAGE PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
ALL FORTINET PRODUCT LINE		ALL FORTINET PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
ALL PALO ALTO PRODUCT LINE		ALL PALO ALTO PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
ALL APC BY SCHNEIDER ELECTRIC PRODUCT LINE		ALL APC PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
ALL COMMVAULT PRODUCT LINE		ALL COMMVAULT PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
EATON ELECTRIC		ALL EATON PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
BOSCH		ALL BOSCH PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
HOSA		ALL HOSA PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
ELMO		ALL ELMO PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST

CRESTRON		ALL CRESTRON PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
SHARP		ALL SHARP PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
MIDDLE ATLANTIC		ALL MIDDLE ATLANTIC PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
CHIEF		ALL CHIEF PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
AVFI		ALL AVFI PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
AVTEQ		ALL AVTEQ PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
C2G		ALL C2G PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
DA-LITE		ALL DA-LITE PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
VADDIO		ALL VADDIO PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST

WIREMOLD		ALL WIREMOLD PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
LISTEN TECH		ALL LISTEN TECH PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
ALTONA		ALL ALTONA PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
SHURE		ALL SHURE PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
ATLAS		ALL ATLAS PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
EPSON		ALL EPSON ELECTRIC PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
JBL		ALL JBL PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
KRAMER		ALL KRAMER PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
PANASONIC		ALL PANASONIC PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST

SONY		ALL SONY PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
VIEWSONIC		ALL VIEWSONIC PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
WILLIAMS SOUND		ALL WILLIAMS SOUND PRODUCTS AVAILABLE FROM ASPIRE TECHNOLOGY PARTNERS, LLC	EACH	CATALOG PRICING PROVIDED UPON REQUEST
Vendor may insert additional cells as needed.				

SECTION "B" - Alternative Methods of Providing "Catalog Pricing"

<u>Alternative Method of Providing Catalog</u>	<u>Description of Alternative Method of Providing Catalog</u>	<u>Vendor's Selection of Alternative Method of Providing Catalog - Mark the option that Vendor Selects</u>		
1. Catalog Pricing is Included in Proposal	If Vendor already has "Catalog Pricing" documents or files compiled, Vendor may check the cell to the right and include a note directing TIPS to please view those documents/files. (Ex. X – Please see "Catalog Pricing" in uploaded document entitled "2022-2023 Vendor Catalog.") Please note that if you are awarded with this type of pricing submission, you will be able to update the pricing and add/remove items within the category as long as you honor any applicable discounts originally proposed.	Place "X" in this cell if "Catalog Pricing is included in Proposal" is Vendor's selection.		

<p>2. Link to Catalog Pricing</p>	<p>If Vendor already has "Catalog Pricing" published at an online location, Vendor may check the cell to the right and include the link to their online "Catalog Pricing." If a login is required to access the "Catalog Pricing" located at that link, please provide that login information in the neighboring cell. (Ex. X – Please see "Catalog Pricing" at www.tips-usa.com, login information is Username: TIPS Password: 123456.) Please note that if you are awarded with this type of pricing submission, you will be able to update the online pricing and add/remove items within this category as long as you honor any applicable discounts originally proposed.</p>	<p>Place link to your "Catalog Pricing" in this cell if "Link to Catalog" is Vendor's selection.</p>	<p>If applicable, provide login information to online "Catalog Pricing" link</p>	
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<p>3. Vendor Shall Provide "Catalog Pricing" Upon Request</p>	<p>If Vendor does not have comprehensive "Catalog Pricing" documents or links readily available, Vendor may check the cell to the right ensuring that such required "Catalog Pricing" will be provided to TIPS upon request. Per the following example, this option is viable but may slow down the TIPS Sale process as follows. (Ex. Vendor is awarded and is making its first TIPS Sale to Sunny ISD, Sunny ISD sends its TIPS PO to TIPS for pricing compliance review. TIPS will then request that Vendor provide documentation of "Catalog Pricing" for the line items included in the PO before TIPS can process the PO and send to Vendor for fulfillment.) Please note that if you are awarded with this type of pricing submission, you will always be able to provide the most current pricing for each item within this category but you will still be required to honor any applicable discounts originally proposed.</p>	<p>Place "X" in this cell if Vendor agrees to provide "Catalog Pricing" upon request from TIPS.</p>		
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Option 2 - Cost-Plus Markup Method

This goods/items pricing proposal method is **not recommended** because many TIPS Members are prohibited from utilizing Vendors with a Cost-Plus Markup Pricing submission, especially w cannot be listed as federally compliant for TIPS purposes if Vendor utilizes this method. If Vendor has read through the entirety of the "Discount-Off Catalog Method" description above and h options are a possibility, then Vendor may use this method which requires that Vendor propose a maximum mark-up percentage in this proposal and then provide TIPS with proof of cost for ea Sale.

<p><u>Cost-Plus Markup Method</u></p>	<p>If Vendor desires to utilize this method, Vendor may enter its maximum markup percentage the cell provided to the right. Please note that this is a maximum percentage and you may always have a lesser markup on a TIPS Sale. You will be required to provide proof of cost to TIPS for every item sold under the TIPS Contract. (Ex. Vendor is awarded and is making its first TIPS Sale to Sunny ISD, Sunny ISD sends its TIPS PO to TIPS for pricing compliance review. TIPS will then request that Vendor provide documentation of Vendor's cost for the line items included in the PO before TIPS can process the PO and send to Vendor for fulfillment.) Please note that if you are awarded with this type of pricing submission, you will always be able to provide the most current cost for each item within this category but you will not be permitted to sell it to TIPS Members for a greater markup than what Vendor provides herein.</p>	<p><u>Vendor's Percentage Markup:</u></p>	<p>Place Vendor's proposed percentage markup in this cell if utilizing the "Cost-Plus Markup Method.</p>
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[REDACTED]

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[REDACTED]

g and does not automatically
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[REDACTED]

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hin the catagory as long as you

% Discount (<i>Greater than Minimum Discount offered in Attribute Except in Limited Circumstances. See Attribute.</i>)	TIPS Price
15.00%	\$85.00
10.00%	
10.00%	

% Discount (<i>Greater than Minimum Discount offered in Attribute Except in Limited Circumstances. See Attribute.</i>)	TIPS Price
12.00%	
HARDWARE, SOFTWARE 33%, MAINTENANCE, 10%	
4.00%	
10.00%	
26.00%	
19.00%	
5.00%	

6.00%	
HARDWARE 20%, SOFTWARE 15%	
10.00%	
15.00%	
15.00%	
25.00%	
28.00%	
15.00%	
2.00%	

30.00%	
15.00%	
35.00%	
30.00%	
25.00%	
5.00%	
17.00%	
29.00%	
15.00%	

30.00%	
27.00%	
15.00%	
5.00%	
19.00%	
1.00%	
11.00%	
20.00%	
10.00%	

8.00%	
5.00%	
7.00%	

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TIPS 230504 Information Technology Equipment, Software, and Services	ASPIRE TECHNOLOGY PARTNERS, LLC
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TIPS PRICING FORM 2 - SERVICE PRICING

Please note that Vendor's "Minimum Percentage Discount Offered" proposed in the attribute questions shall apply to services proposed with the exception of vendor travel passed through at actual cost or GSA allowable under this contract, Vendor may type "N/A" on this form and submit. If Vendor desires to offer services under this TIPS Contract, the "Catalog Pricing" for those services must either be listed within this form as instructed or properly added during the life of the awarded contract. All services must be provided in some unit cost (Ex. Per Hour, Per Person, Per Day, etc.). If Vendor already has service "Catalog Pricing" documents, links, or files compiled, Vendor may include a note below the Pricing Form 2 directing TIPS to please view those documents/links/files. (Ex. X – Please see "Service "Catalog Pricing" in uploaded document entitled "2022-2023 Vendor Service Pricing.").

Providing Service "Catalog Pricing" through Pricing Form 2 Line-Item Pricing

If Vendor desires to list the services that Vendor sells by line-item, Vendor is welcome to do so below in this Pricing Form 2. All services must be provided in some unit cost (Ex. Per Hour, Per Person, Per Day, etc.). Vendor may list the services in any column titles as long as TIPS can identify the service being offered by name, unit-type, and "catalog price" of the service. Please note that if you are awarded after submitting your service pricing on this form, you will be required to update the pricing and add/remove services within this category as long as you honor any applicable discounts originally proposed. If Vendor already has service "Catalog Pricing" documents, links, or files compiled, Vendor may include a note below the Pricing Form 2 directing TIPS to please view those documents/links/files. (Ex. X – Please see "Service "Catalog Pricing" in uploaded document entitled "2022-2023 Vendor Service Pricing.") Please note that if you are awarded after submitting your service pricing through this form, you will be required to update the pricing and add/remove services within this category as long as you honor any applicable discounts originally proposed.

Service Name	Service Description	Specify Unit Type (Ex. Per Hour, Per Person, Per Day, etc.)	Unit Pricing Not-to-Exceed	% Discount (Greater than Minimum Discount offered in Attribute Except in Limited Circumstances. See Attribute.)	TIPS Price - Not to Exceed
Example 1: Installation	Tech Level 1 Installation	Hourly/Tech	\$100.00/hour/tech	5.00%	\$95.00/hour/tech
Example 2: Installation	Tech Level 2 Installation	Hourly/Tech	\$150.00/hour/tech	5.00%	\$142.50/hour/tech
Example 3: Mileage	Travel by Car to installation location	Per Person/Per Mile	GSA allowable rate at the time of service. See https://www.perdiem101.com/mileage .	0.00%	GSA allowable rate at the time of service. See https://www.perdiem101.com/mileage .
Example 4: Travel	Travel to installation location	Per Person/Per Hour	50% of regular hours Installation Charge	5.00%	45% of regular hours Installation Charge
Example 5: Flights	Travel by Flight to installation	Per Person	Actual Cost of Flight	0.00%	Actual Cost of Flight
Example 6: Custom Design Services	Custom Design	Per Designer/Per Square Foot	Not-to-Exceed \$200/Square Foot	5.00%	Not-to-Exceed \$190/Square Foot
Example 7: Training	Training Client on Use of Product	Per Trainer/Per Hour	Not-to-Exceed \$20.00/Trainer/Hour	5.00%	Not-to-Exceed \$19.00/Trainer/Hour

Insert Line-items below this line. You may add cells as needed.

Service Name	Service Description	Specify Unit Type -(Ex. Per Hour, Per Person, Per Day, etc.)	Unit Pricing Not-to-Exceed	% Discount (Greater than Minimum Discount offered in Attribute Except in Limited Circumstances. See Attribute.)	TIPS Price - Not to Exceed
PROJECT EVALUATION	PROJECT EVALUATION	HOURLY	\$275.00	10.00%	\$250.00
PROJECT DESIGN	PROJECT DESIGN	HOURLY	\$275.00	10.00%	\$250.00
PROJECT PLANNING	PROJECT PLANNING	HOURLY	\$275.00	10.00%	\$250.00
PROJECT INSTALLATION AND CONFIGURATION	PROJECT INSTALLATION AND CONFIGURATION	HOURLY	\$275.00	10.00%	\$250.00
PROJECT MANAGEMENT	PROJECT MANAGEMENT	HOURLY	\$275.00	10.00%	\$250.00
MANAGED DETECTION AND RESPONSE	ADVANCED THREAT MONITORING, DETECTION AND RAPID RESPONSE	PER DEVICE/PER MONTH	NUMEROUS	10.00%	
MANAGED SECURITY SERVICES	24X7 EVENT MONITORING AND DEVICE MANAGEMENT	PER DEVICE/PER MONTH	NUMEROUS	10.00%	
MANAGED SECURITY SERVICES	NEXT GENERATION FIREWALL (SMALL)	PER DEVICE/PER MONTH	\$275.00	10.00%	\$250.00
MANAGED SECURITY SERVICES	NEXT GENERATION FIREWALL (MEDIUM)	PER DEVICE/PER MONTH	\$330.00	10.00%	\$300.00
MANAGED SECURITY SERVICES	NEXT GENERATION FIREWALL (LARGE)	PER DEVICE/PER MONTH	\$495.00	10.00%	\$450.00
MANAGED SECURITY SERVICES	CISCO IDENTITY SERVICES ENGINE (ISE) - PHYSICAL OR VIRTUAL	PER NODE/PER MONTH	\$550.00	10.00%	\$500.00
MANAGED COLLABORATION SERVICES	END TO END MANAGEMENT OF UNIFIED COMMUNICATIONS, CONTACT CENTER, VIDEO SYSTEMS, AND ROUTING/SWITCHING DEVICES				
MANAGED COLLABORATION SERVICES	VOICE GATEWAY	PER DEVICE/PER MONTH	\$71.50	10.00%	\$65.00
MANAGED COLLABORATION SERVICES	UC APPLICATIONS	PER DEVICE/PER MONTH	\$165.00	10.00%	\$150.00
MANAGED COLLABORATION SERVICES	UC UCS SERVER	PER DEVICE/PER MONTH	\$71.50	10.00%	\$65.00
MANAGED INFRASTRUCTURE SERVICES	INFRASTRUCTURE MONITORING, RESPONSE AND MANAGED INFRASTRUCTURE OPERATIONS				
MANAGED INFRASTRUCTURE SERVICES	ROUTER	PER DEVICE/PER MONTH	\$66.00	10.00%	\$60.00
MANAGED INFRASTRUCTURE SERVICES	SWITCH - CORE	PER DEVICE/PER MONTH	\$82.50	10.00%	\$75.00
MANAGED INFRASTRUCTURE SERVICES	SWITCH - DISTRIBUTION	PER DEVICE/PER MONTH	\$60.50	10.00%	\$55.00
MANAGED INFRASTRUCTURE SERVICES	SWITCH - ACCESS	PER DEVICE/PER MONTH	\$44.00	10.00%	\$40.00
MANAGED INFRASTRUCTURE SERVICES	SERVER	PER DEVICE/PER MONTH	\$49.50	10.00%	\$45.00
MANAGED STAFFING SERVICES		PER FTE/PER DAY	\$2,500.00	25.00%	\$2,000.00
Vendor may insert additional cells as needed.					

[REDACTED]

ible rates. If Vendor does not seek to offer services
ucted, otherwise included within Vendor's proposal,
or files compiled, Vendor may include a note on

[REDACTED]

. You are welcome to modify the columns and
I be able to update the pricing and add/remove
irecting TIPS to please view those
ough other documents/links/files, you will be able to

APPLICABLE DEVICES/PER MONTH WILL RECEIV

APPLICABLE DEVICES/PER MONTH WILL RECEIV

Lakeside Union School District

Line Number	Item Name	Description	Lead Time	Included Item	Quantity	Pricing Term	ListPrice
1.0	A-FLEX-3	Collaboration Flex Plan 3.0	N/A	No	1		0.00
Initial Term - 60.00Months Auto Renewal Term - 0.0 Months Billing Model - Annual Billing Requested Start Date - 01-May-2024 Requested End Date - 30-Apr-2029							
1.1	A-FLEX-EACL-E	EntW Webex Calling for Education	N/A	No	375	1	13.25
1.2	A-FLEX-C-PRO	Webex Calling Entitlement	N/A	No	450	1	0.00
1.3	A-FLEX-CL-COMMON-E	Webex Calling Workspace for Common Area Add-on for	N/A	No	150	1	7.50
1.4	A-FLEX-ERC	Emergency Response Center Call fee per location search	N/A	No	0		43.00
1.5	A-FLEX-CL-CA	Webex Calling Common Area Entitlement	N/A	No	298	1	0.00
1.6	A-FLEX-P-CALL	Prem to Webex Calling / UCM Cloud	N/A	No	375	1	0.00
1.7	SVS-FLEX-SUPT-BAS	Basic Support for Flex Plan	N/A	No	485	1	0.00
1.8	A-FLEX-FILESTG-ENT	File Storage Entitlement	N/A	No	9000	1	0.00
1.9	A-FLEX-PROPACK-ENT	Pro Pack for Cisco Control Hub Entitlement	N/A	No	450	1	0.00
1.10	A-FLEX-EDU-CUST	Education Customer	N/A	No	1	1	0.00
1.11	A-FLEX-C-DEV-ENT	Cloud Device Registration Entitlement	N/A	No	450	1	0.00
1.12	A-FLEX-MSG-ENT	Messaging Entitlement	N/A	No	450	1	0.00
Configuration Total					SubTotal		
2.0	CP-7800-WMK=	Spare Wallmount Kit for Cisco UC Phone 7800 Series	N/A	No	400		99.03
Configuration Total					SubTotal		
3.0	CP-7841-3PCC-K9=	Cisco IP Phone 7841 with Multiplatform Phone firmware	N/A	No	450		427.13
Configuration Total					SubTotal		
4.0	CP-8851-3PCC-K9=	Cisco IP Phone 8851 with Multiplatform Phone firmware	N/A	No	55		713.55
Configuration Total					SubTotal		
5.0	ATA192-3PW-K9	192 Analog Telephone Adapter for MPP with switch	N/A	No	1		294.47
Initial Term - nullMonths Auto Renewal Term - null Months Billing Model - null Requested Start Date - - - Requested End Date - - -							
5.1	ATA191-CLIP-NA	Power Clip for ATA191 and ATA192, North America	N/A	No	1		0.00
Configuration Total					SubTotal		
7.0	CP-8800-A-KEM-3PC=	Cisco 8800 series KEM for Audio IP Phones with MPP firmware	N/A	No	25		592.95
Configuration Total					SubTotal		

Extended ListPrice	Sell Price TIPS Contract 33%
0.00	
298,125.00	\$199,743.75
0.00	
67,500.00	\$45,225.00
0.00	
0.00	
0.00	
0.00	
0.00	
0.00	
0.00	
0.00	
0.00	
365,625.00	\$244,968.75
39,612.00	\$66.35
39,612.00	\$26,540.00
192,208.50	\$286.18
192,208.50	\$128,781.00
39,245.25	\$478.08
39,245.25	\$26,294.40
294.47	\$197.30
0.00	
294.47	\$197.30
14,823.75	\$397.28
14,823.75	\$9,932.00

LAKE SIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: May 9, 2024

Agenda Item:

ASES Grant Contract

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

After School Education and Safety Program (ASES) contract for fiscal Year 2023-24 (Grant ID37-23939-1037-EZ)

Fiscal Impact (Cost):

N/A

Funding Source:

N/A

Recommended Action:

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


Originating Department/School: ESS/ASES Grant Programs

Submitted/Recommended By:

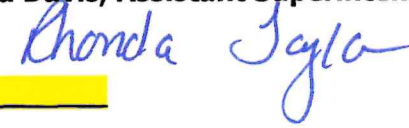
Approved for Submission to the Governing Board:



Jerred Murphy, Manager-ESS



Lisa Davis, Assistant Superintendent



Reviewed by Cabinet Member: _____

MEMORANDUM OF AGREEMENT

This Agreement for the After School Education and Safety (ASES) program is entered into and effective as of the 1st day of July 2023 by and between the **San Diego County Superintendent of Schools** (hereinafter referred to as “SDCOE”) and **Lakeside Union Elementary** (hereinafter referred to as “District”) who agrees to contract for and provide the ASES Program services as specified in the grant. The District further agrees to follow all fiscal reporting and auditing standards required of the ASES Program, in accordance with the provisions of the California Education Code (EDC) Sections 8482-8484.65 and Assurance 5 of ASES Grant Award Assurances from original renewal application. Failure to comply with the following grant rules, regulations, and policies may result in denial of the remaining grant amount and an invoice from the SDCOE to the District for up to the entire grant amount allocated for the ASES Program. Any invoice from the California Department of Education (CDE) to the SDCOE due to the District’s failure to comply with grant rules, regulations and policies will result in the District reimbursing the full invoice amount(s) to the SDCOE within 30 days of submission of such invoice(s).

1. SCOPE OF SERVICES: GENERAL CONDITIONS

A. DISTRICT ASSURANCES

In accordance with the provisions of the California Education Code (EDC) Sections 8482-8484.65, the purpose of the ASES program is to create incentives for establishing locally driven before and after school enrichment programs both during school days and summer, intersession, or vacation days that partner public schools and communities to provide academic and literacy support and safe, constructive alternatives for youth. It is the intent of the Legislature that all youth participating in elementary, middle or junior high school ASES programs participate in the full day of the program every day. [EDC 8483(a)(2)]

In accordance with California Education Code (EDC) Sections 8482-8484.65, the District agrees to implement the following:

ASES Priority Enrollment

1. Priority for enrollment of students in a before or after school program, in accordance with Assurance 22 of ASES Grant Award Assurances, must be prioritized in the following order:
 - A. Homeless Youth, as defined by the federal McKinney-Vento Homeless Assistance Act (42 U.S.C. Sec. 11434a) and *EDC* Sections 8483(c)(1)(A); 8483.1(d)(1)(A). Homelessness is defined as one or more of the following situations:
 - a. Emergency or transitional shelter
 - b. Hotel or Motel
 - c. Unsheltered (i.e., cars, parks, garage, campgrounds)
 - d. Temporarily with another person or relatives due to economic hardship or

- loss of housing (i.e., eviction, inability to pay the rent, destruction of home, illness, loss of employment, etc.)
 - e. Unaccompanied youth not living with parent or guardian
 - f. Substandard housing (i.e., no water or electricity; health or safety risks)
 - B. Foster Youth, as designated through a juvenile dependency court petition [*EDC* Sections 8483(c)(1)(A); 8483.1(d)(1)(A)]
 - C. Youth Eligible for Free or Reduced-Priced Meals, as defined yearly in the CDE Student Poverty FPM Data report [*EDC* Sections 8483(c)(1)(A); 8483.1(d)(1)(A)]
 - D. Middle and junior high school students participating in the full day of the program every day [*EDC* Section 8483(c)(B)]
2. A program shall inform the parent or caregiver of a pupil of the rights of homeless children, foster children, and children eligible for free or reduced-price meals to receive priority enrollment and how to request priority enrollment. [*EDC* Sections 8483(d); 8483.1(e)]

ASES Program Operation and Attendance Requirements:

After School

1. The After School program will begin operation immediately upon the conclusion of the regular school day and operate a minimum of 15 hours per week (minimum of three hours per day) and at least until 6:00 p.m. on every regular school day. [*EDC* Section 8483(a)(1)(A)(i); Assurances 16, 17, 18 of ASES Grant Award Assurances]
2. The After School program will establish a reasonable early daily release of students from the program. This policy should include, at a minimum, a procedure that allows parents to provide written notification that outlines the date range, early release time, and reason for the early release for their student. Programs operating in a community where the early release policy does not meet the unique needs of that community or school, or both, can provide documentation of an alternative plan and request approval from the SDCOE. [*EDC* Section 8483(a)(1)(B); Assurance 19 of ASES Grant Award Assurances]
3. It is the intent of the Legislature that elementary and middle school (or junior high school) students participate in the full day of the program every day during which students participate, except as allowed by the early release policy. [*EDC* Section 8483(a)(2); Assurance 20 of ASES Grant Award Assurances]
4. To develop an age-appropriate program, for middle or junior high school students, a flexible attendance schedule may be implemented. [*EDC* Section 8483(a)(3); Assurance 21 of ASES Grant Award Assurances]

Before School Program

1. The Before School program will operate at least one and one half hours (1 1/2) per regular schoolday. [*EDC* Section 8483.1(a)(1)]
2. The Before School program will establish a reasonable late arrival policy and procedure for students arriving late to the Before School program. This policy should include, at a minimum, a procedure that allows parents to provide written notification that outlines the

- date range, late arrival time, and reason for the late arrival for their student. [EDC Section 8483.1(a)(1)]
3. It is the intent of the Legislature that elementary and middle school (or junior high school) students participate in the full day of the program every day during which students participate, except as allowed by the late arrival policy. [EDC Section 8483.1(a)(2)(A)]
 4. A student who attends less than one-half of the daily program hours cannot be counted for attendance purposes. [EDC Section 8483.1(a)(2)(B)]
 5. To develop an age-appropriate program, for middle or junior high school students, a flexible schedule may be implemented. [EDC Section 8483.1(a)(3)]

Before and After School Supplemental Program

1. During summer, intersession, or vacation periods, supplemental programs must operate a minimum of four and one-half (4 ½) hours per day. [EDC Section 8483.2]

Attendance Requirement

The goal for each District ASES program site is to meet 100% of the daily attendance goals (ADA) based on the grant amount awarded. To ensure that subsequent ASES grant awards will not be adjusted due to insufficient program attendance and performance, District must enforce the grant rules in compliance with California *Education Code* 8483.7(a)(1)(A) which states that “each school that establishes a program pursuant to this article is eligible to receive a three-year after school grant, that shall be awarded in three one-year increments and is subject to semiannual attendance reporting and requirements as described in *EDC* Section 8482.3 once every three years.”

CDE is authorized, under *EDC* Section 8483.7 to conduct a review of the program and make grant funding adjustments should ASES program sites fail to maintain specific attendance levels. Specifically,

1. Any ASES program that falls below target attendance levels by more than 15 percent in each of two consecutive years may be adjusted. [EDC Section 8483.7(a)(1)(C)(ii)]
2. Any ASES program that falls below 75% of target attendance levels in any year of the grant may be adjusted. [EDC Section 8483.7(a)(1)(D)(ii)]

As per California *EDC* Section 8483.7(a)(1)(B), the California Department of Education (CDE) provides technical support through the System of Support for Expanded Learning (SSEL) to programs experiencing student attendance below minimum requirements.

General Program Requirements:

The intent of the Legislature as enacted is to provide programming that focuses on “developing the academic, social, emotional, and physical needs and interests of pupils through hands-on, engaging learning experiences”. [EDC Section 8482.1(a)] To ensure the District develops ASES

programming consistent with this intent, the following requirements are in place for FY 2023-2024:

1. The District shall identify a qualified District Contact to be the direct liaison between the ASES program and the SDCOE, attending all monthly San Diego Expanded Learning Consortium meetings. For purposes of this document, the term “qualified” describes the District Contact’s ability to have access to paths of communication with District Administration to enable the success of their duties and to ensure quality programs that comply with California *EDC* Sections 8482-8484.65 and Assurance 4 of ASES Grant Award Assurances. In this regard, the role of the District Contact includes:
 - a. General program oversight
 - b. Programmatic development
 - c. Compliance responsibility
 - d. Reporting responsibility
2. The District shall provide a detailed Program Plan for their overall vision of the ASES Program. The ASES Program Plan shall be a fluid document capturing the changes in programming throughout FY 2023-24 and updated as necessary to provide an accurate reflection of programming. Initial District Program Plan information must be uploaded to Cityspan no later than October 31, 2023.
3. The District shall work with program sites to develop an individualized scope and sequence and schedule that aligns with the overall District vision.
4. The District shall ensure that each ASES program shall consist of an educational and literacy element designed to provide tutoring and/or homework assistance in one or more of the following core content subject areas: language arts, mathematics, history and social science, computer training, or science. [*EDC* Section 8482.3(c)(1)(A); Assurance 1 of ASES Grant Award Assurances]
5. The District shall ensure that each ASES program shall consist of an educational enrichment element that may include, but not limited to, fine arts, career technical education, recreation, physical fitness and prevention activities. Such activities should be determined based on students’ needs and interests. [*EDC* Section 8482.3(c)(1)(B); Assurance 2 of ASES Grant Award Assurances]
6. The District shall ensure that their ASES programs are “planned through a collaborative process that includes parents, youth, and representatives of participating public schools, governmental agencies, such as city and County parks and recreation departments, local law enforcement, community organizations, and the private sector,” and that has demonstrated support of the school site principal and staff [*EDC* Section 8482.5(b); Assurances 11 and 26 of ASES Grant Award Assurances]

Web-Based Attendance and Daily Attendance Accountability Requirements:

The District is required to maintain attendance documentation for the ASES program as follows:

1. The District's ASES program must follow the SDCOE attendance collection process to include entering complete student enrollment information, including the State Student Identifier (SSID) number.
2. In FY 23/24, Districts receiving ASES funds must implement the Cityspan Web-based Attendance Tracking System (www.youthservices.net/sandiego) for daily program attendance entry.
3. District shall fully utilize the "Automated Card Scanning" capability for the system. The Cityspan Web-Based Attendance Tracking System will ensure that full attendance is documented only for students complying with their individual Early Release/Late Arrival times on file in accordance with ASES Program California EDC Sections 8483(a)(1)(A)(i) and 8483(a)(1)(B) and the intent of the Early Release/Late Arrival policies for students in the ASES program.
4. The District shall use the web-based attendance system's card scanning features to ensure that all students are counted for attendance purposes in compliance with EDC Sections 8483(a)(1)(A)(i) and 8483(a)(1)(B).
5. District ensures that there is a process for monitoring site-level attendance procedures.
6. District will identify and ensure participation by key staff members in professional development provided by the SDCOE for implementation of attendance collection processes and procedures.
7. District will ensure that all staff members participating in attendance collection procedures receive training and utilize a unique username/password provided by the SDCOE.

Staffing Requirements

All ASES program sites are required to comply with the staffing requirements outlined in EDC Section 8483.4 and Assurances 32, 33, and 34 of ASES Grant Award Assurances. These include:

1. District must "establish minimum qualifications for each staff position that, at a minimum, ensure that all staff members who directly supervise pupils meet the minimum qualifications for an instructional aide, pursuant to the policies of the school district."
2. Selection of the program site supervisor(s) are subject to the approval of the schoolsite principal.
3. All ASES programs must maintain a pupil-to-staff member ratio of no more than 20 to 1. [Assurance 31 of ASES Grant Award Assurances]
4. District must certify that all personnel providing services to students are adequately screened including, but not limited to, health screening, including tuberculosis, fingerprint clearance, and any other screening to prevent the assignment of personnel who may pose a threat to the safety and welfare of students.
5. District shall be solely responsible for students, staff, and parents accessing services under this Agreement. District certifies that it will provide adequate supervision of the students, parents, staff, trainees and other providers, and that its staff will follow legal guidelines on reporting child abuse/neglect.
6. *For Districts contracting with third party providers:* in accordance with EDC Sections

8483.4(b) and 8483.4(c), the District “shall require the third party to notify the local educational agency by the next working day following, and to submit a written report within seven days of, the occurrence of any health- or safety-related issues, including, but not limited to, issues involving criminal background clearances for employees, building safety, and any event specified in subdivision (c).” Events, as noted previously, include:

- a. Death of a child from any cause
 - b. Any injury to a child that requires medical treatment
 - c. Any unusual incident or child absence that threatens the physical or emotional health or safety of a child
 - d. Any suspected child abuse or neglect, as defined in Section 11165.6 of the Penal Code
 - e. Epidemic outbreaks
 - f. Poisonings
 - g. Fires or explosions that occur in or on the premises
 - h. Exposure to toxic substances
 - i. An arrest of an employee of the third party
 - j. Any other event as specified by the LEA
7. *For Districts contracting with third party providers:* in accordance with *EDC* Section 8483.4(d), the District “shall require the third party to request from parents or guardians pupil health information, such as whether a pupil has allergies or asthma, before pupil enrollment. Parents or guardians may provide this information at their discretion and are not required to provide pupil health information in order for the pupil to receive services.”
 8. District must reserve the right to accept or reject the assignment of any personnel and the right to remove him/her from District’s premises.
 9. District must provide evidence during audit or FPM to verify that staff minimum qualifications are met. District acknowledges that, by agreeing to this Memorandum of Agreement, the District waives their right under *EDC* Section 45274, and must provide evidence of minimum qualifications including, but not limited to, examination records and scores, and transcripts.
 10. Staff *must* receive staff training and development. The program may provide three days of staff development during regular program hours using funds from the total grant award. [*EDC* Sections 8483.3(c)(4) and 8483.7(a)(4); Assurances 24 and 36 of ASES Grant Award Assurances]

State-Mandated Data and Evaluation Requirements

All Districts must participate in the state Annual Outcomes Evaluation process and the SDCOE’s CQGrowth process in accordance with *EDC* Section 8484 and Assurances 6, 29, and 30 of ASES Grant Award Assurances. Specifically,

1. District must participate in a statewide evaluation process as determined by the CDE and provide all required information, including state student identifiers.
2. District must respond to additional surveys or other methods of data collection that may be required throughout the duration of the program in a timely manner.

3. District must annually provide participating pupils' regular school day and program attendance as required by CDE in a timely manner. [Assurance 7 of ASES Grant Award Assurances]
4. District must ensure the timely and accurate collection of data required to conduct the ASES program evaluations, including but not limited to, student demographic information. It is highly recommended for District ASES programs to utilize the Cityspan Online Registration system that provides for parent/guardian input of demographic data during the initial enrollment period.
5. District must participate in the SDCOE process for Continuous Quality Improvement to include solicitation of feedback, participation in survey requests, and regular attendance at District Contact meetings. For FY 2023-24, the Continuous Quality Improvement theme is communication and collaboration. [Assurance 42 of ASES Grant Award Assurances]
6. For FY 2023-24, the District will participate in the ASES CQI process to include:

Quarter 1-2

- Attend the Grant/Fiscal Orientation meeting, including a one-hour meeting on the Quality Standards for Expanded Learning hosted by the System of Support for Expanded Learning
- Complete the District Program Plan in Cityspan which follows the suggested CDE Program Plan template provided by the SDCOE
- Participate in SDCOE CQGrowth Meetings to discuss planning and goal setting

Quarter 3-4

- Based on results of the CQGrowth Meeting, District will be asked to complete additional information related to program quality. This may include:
 - District communication map
 - District mission, vision, purpose
 - Distribution of Stakeholder Surveys (student, parent, administrator, teacher)
 - 23-24 District goals for program sites
- Participate in a Data Review Meeting with the SDCOE prior to May 31, 2023 to include:
 - Program site review of available data
 - Discussion of survey results
 - Identification of preliminary goals for 2024-2025 school year
 - Completion of the SDCOE FPM Self-Assessment tool

Student Reimbursement Rate, Payment, and Program Expenditure Guidelines

1. District will distribute allocated funds to participating schools and ensure fiscal accountability in accordance with *EDC* Sections 8482-8484.65. This includes a reimbursement calculation formula that is consistent with CDE guidelines that provide

for a rate of \$10.18 per student per day for PM (ASES) reimbursement and a rate of \$6.78 per student per day for AM (Before School) reimbursement.

2. District will allow participation of any student of a participating school regardless of their ability to pay, subject to program capacity. [*EDC* Section 8482.6; Assurance 12 of ASES Grant Award Assurances]
3. Upon notification of overpayment of the ASES grant in excess of the grant award amount or request for reimbursement of unexpended ASES grant funds by the CDE, the District will be required to return the entire amount of funding in question to the SDCOE in accordance with *EDC* Section 8483.8.
4. District will ensure that expenditures shall comply with all applicable provisions of state and local rules, regulations and policies relating to the administration, use, and accounting for public school funds, including, but not limited to, California Education Code.
5. Failure to comply with *EDC* Sections 8483.7(a)(1)(B)(i) and 8483.7(a)(1)(C)(ii) may result in an adjustment of the ASES grant award during the current fiscal year or in subsequent years of the grant.

Federal Program Monitoring and Annual Program Audit Guidelines.

1. District assumes all fiscal accountability and oversight for program sites and district expenses and will follow all fiscal and auditing standards required by *EDC* Sections 8482.3(f)(5); 8484.8(b)(3)(4); Assurance 28 of ASES Grant Award Assurances.
2. District will provide a copy of Federal Program Monitoring (FPM) and Annual Program Audit findings/exceptions to SDCOE relative to the administration of the ASES Grant Requirements per *EDC* Sections 8482-8484.65 and the 2023-24 Guide for Annual Audits of California K-12 Local Education Agencies and State Compliance Reporting
3. District will participate in Federal Program Monitoring (FPM) training as conducted by the SDCOE.

Budget Restrictions

1. No more than 15% of grant funding may be used for administrative costs (including indirect costs equal to the lesser of 5% of the grant amount or the District approved CDE indirect cost rate). [*EDC* Sections 8483.9(b) and 8483.9(a)(2); Assurances 39 and 40 of ASES Grant Award Assurances]
2. Each grantee must expend at least 85% of grant funding directly for pupils. Cost of a program site supervisor may be included as direct services, provided that at least 85% of the site supervisor's time is spent at the program site. [*EDC* Section 8483.9(c); Assurance 41 of ASES Grant Award Assurances]
3. Identify and secure Matching Funds/In-Kind Contributions for the ASES program. District is required to submit the 33% Match/In-Kind for FY 2023-24 (based on actual expenditures) via the Cityspan Web-based Attendance and Fiscal Management System by October 31, 2024. No more than 25% of the required local contribution can be facilities or space usage. State categorical funds cannot be used to meet this match requirement

- [EDC Sections 8483.7(a)(6) and 8433.75(a)(4); Assurances 37 and 38 of ASES Grant Award Assurances]
4. Funds must supplement, not supplant, existing services. Programs cannot use ASES funds to pay for existing levels of service. State categorical funds for remedial education activities cannot be used for local match. [EDC Sections 8483.7(7)(B)(b) and 8483.75(5)(B)(b); Assurance 35 of ASES Grant Award Assurances]
 5. The District maintains a running inventory record for each piece of equipment, with a total acquisition cost of \$500 or more per unit that is purchased with state and/or federal funds. Also, the District must conduct a physical check of the inventory of equipment, at least, every two years and reconcile with inventory records (34 CFR 80.32(d)(2)). District will also be required to report all Inventory Items via the Cityspan Web-based Attendance and Fiscal Management System by October 31, 2024. [EDC Section 35168]
 6. The record describes the acquisition by:
 - a. Type
 - b. Model
 - c. Serial number
 - d. Funding source
 - e. Acquisition date
 - f. Cost
 - g. Location
 - h. Current condition
 - i. Transfer, replacement, or disposition of obsolete or unusable equipment [EDC Section 35168; 5 CCR 3946; 34 CFR 80.32(d) (I)]
 7. District must follow all fiscal and auditing standards required. [EDC Sections 8482.3(f)(5); 8484.8(b)(3); 8484.8(b)(4)] District can be required to provide copies of the following documents to SDCOE:
 - Before and after school ASES Program (EXLP) contracts – for ASES subcontracts to provider agencies that operate Before and/or After school ASES Programs.
 - EXLP duty statements and/or job descriptions that are related to the cost that are associated with operating the EXLP.
 - EXLP line item budgets.
 - EXLP time accounting, including time accounting methods.
 8. The District will be required to submit the 2023-24 85/15 report via the Cityspan Web-Based Attendance and Fiscal Management System no later than October 31, 2024. NOTE: For Program Sites utilizing subcontracted providers, District is responsible and has direct oversight of subcontractor expenses to ensure compliance with 85/15 requirements. SDCOE shall provide a subcontracted services 85/15 template to be completed by subcontracted providers and incorporated by the District into site-level and District 85/15 reports.
 9. District will need prior approval from SDCOE to make a capital expenditure purchase with ASES grant funds of \$5,000 (tax included) or more. Replacement equipment, other capital assets, and improvements which materially increase the value or useful life of equipment, or other capital assets are allowable as a direct cost when approved by the

awarding agency. The Federal requirements found in the OMB guidance cited at Title 2, *Code of Federal Regulations (CFR)*, Part 200.439 (Cost Principles for Equipment and other capital expenditures), require a grantee or sub-grantee to obtain prior written approval from its awarding agency before incurring the cost of a capital expenditure. Both the OMB guidance and generally accepted accounting principles identify equipment as a capital expenditure.

Additional ASES Program Operation Requirements

1. Any ASES family fees must be in alignment with EDC Section 8482.6 and ASES Grant Award Assurance 13, specifically “Programs that charge family fees shall waive the cost of these fees for pupils who are eligible for free or reduced-price meals, for a child that is a homeless youth, as defined by the federal McKinney-Vento Homeless Assistance Act (42 U.S.C. Sec. 11434a), or for a child who the program knows is in foster care. A program that charges family fees shall schedule fees on a sliding scale that considers family income and ability to pay.
2. Provide an afterschool snack/meal or before school meal that conforms to nutrition standards as established by the U.S. Department of Agriculture. It is the intent of the Legislature that ASES programs seek to qualify program sites as approved distribution sites for federally funded after school snacks or meals rather than using core operating funds. [*EDC* Sections 8483.1(c); 8483.3(c)(8); 8483.95; Assurance 3 of ASES Grant Award Assurances]
3. Provide a safe physical and emotional environment, opportunities for relationship building, and promote active student engagement. [Assurance 23 of ASES Grant Award Assurances]
4. Provide opportunities for physical activity. [*EDC* Section 8483.3(c)(7); Assurance 27 of ASES Grant Award Assurances]
5. If the site is not located on a school campus, it must align the educational and literacy component of the program with the regular school program. Offsite programs will not be approved unless safe transportation is provided by the District or designee. [*EDC* Section 8484.6; Assurances 14 and 15 of ASES Grant Award Assurances]
6. Programs may be conducted on the grounds of a community park, recreational facility, or other site approved by the California Department of Education upon approval [*EDC* Section 8484.6(a); Assurance 43 of ASES Grant Award Assurances]
7. Provide notices, reports, statements, and records sent to parents in any primary language other than English if more than 15 percent speak a single primary language other than English. [*EDC* Section 48985(a); Assurance 45 of ASES Grant Award Assurances]
8. Communicate and collaborate with the regular school day program and other expanded learning opportunities. [Assurance 25 of ASES Grant Award Assurances]
9. Identify, assign, and maintain indoor/outdoor space at participating school sites that are to be utilized by the ASES program.
10. Notify the SDCOE in the event the District intends to close or relocate an ASES program school site, either temporarily or permanently.
11. Host scheduled technical assistance site visits conducted by staff from the SDCOE and the Children’s Initiative.

12. Ensure the proper record keeping and documentation of program activities and the timely submission of all required reports.

As the official Grantee of Record, the SDCOE will provide the following:

1. In coordination with the District, inform statewide ASES efforts impacting San Diego County by working with the California Department of Education, the Governor's Office, the Office of the Secretary of Education, the Department of Finance, the California State Legislature, and the California Advisory Committee on Before and Afterschool ASES Programs.
2. In coordination with the District, educate and involve stakeholders and elected officials including: parents, government agencies, community organizations, and the private sector in ASES issues and efforts.
3. Serve as the fiscal, technical, and program liaison between the District, school sites, and the California Department of Education regarding the ASES programs.
4. Maintain files of MOAs and invoices submitted by implementing districts.
5. Establish and maintain master files of ASES participants, funding levels, attendance, expenditures, allocations, and payment transmittals.
6. Verify all ASES funding levels and allocations based on official records provided by CDE.
7. Ensure the timely collection of all required data and submission of evaluation reports, and incur the associated sub-contracted costs, as negotiated.
8. Develop, verify, and obtain appropriate signatures on all required ASES reports for submission to CDE.
9. Using information provided by CDE, prepare quarterly, semi-annual, and annual progress reports and submit to CDE by the required deadlines. [Assurance 8 of ASES Grant Award Assurances]
10. Provide funding notification and payment distribution to Districts in a timely manner.
11. Ensure that SDCOE program goals, as described in the Program Plan submitted as part of the ASES grant application, are met efficiently and effectively through annual review of program goals through CQGrowth processes at the SDCOE, District, and site-level. Documentation of review shall be monitored by the California Department of Education as part of its onsite monitoring process [Assurance 9 and 10 of ASES Grant Award Assurances]
12. Ensure that information on fiscal requirements is shared with all partners expediently.
13. Share data on program process and outcomes via District Contact meetings and Consortium Steering Committee meetings.
14. Convene, in coordination with the District, meetings of ASES stakeholders, as necessary.
15. Coordinate any publicity, press releases or media coverage of programs with the District prior to release and distribution.
16. Ensure that all staff positions, project materials, or services funded with the 3% consortium fee directly provide and serve the SDCOE's ASES funded before and after school programs.
17. Provide training and technical assistance to Districts in San Diego County in excess of

those provided through the System of Support for Expanded Learning and the Children's Initiative. [Assurance 24 of ASES Grant Award Assurances]

18. Ensure the development and maintenance of a web-based attendance reporting system for use of all consortium members and participating districts.
19. Ensure consortium-wide program evaluation and the preparation of California Department of Education required evaluation reports.
20. Conduct annual needs assessment and convene task forces for needed areas of program training, technical assistance, products, and support.
21. With input from consortium members, develop protocols for site visits, information sharing, advocacy, public relations and marketing activities, and other events impacting ASES programs.
22. Provide training and technical assistance in preparation for Federal Program Monitoring (FPM) visits from California Department of Education, and document upload to the CDE Compliance Monitoring Tool (CMT).

B. TERMS AND CONDITIONS OF GRANT AWARD

1. All statutes and regulations applicable to each program under which state funds are made available through this application will be met by the District in its administration of each site program.
2. District will make reports to the SDCOE as necessary to enable the SDCOE to perform its duties and will maintain such records and provide access to those records as the SDCOE deems necessary. The District shall maintain such records for at least five (5) years after the completion of the activities for which the funds are used.
3. District will make any application, evaluation, periodic program plan, or report relating to each program available to parents and other members of the general public. (California Public Records Act, Government Code Section 6250 et seq.)
4. This grant shall be administered in accordance with the provisions of *EDC* Sections 8482-8484.65. Further, expenditures shall comply with all applicable provisions of federal, state and local rules, regulations and policies relating to the administration, use and accounting for public school funds, including, but not limited to, the Education Code of the state of California.
5. The grantee shall use these funds in accordance with the approved application.
6. If a program participant receives state funds to operate ASES in excess of the amount warranted due to the program failing to operate and the program serving fewer pupils than planned, raising an inadequate amount of matching funds, failing to expend funds fully or any other reason during the grant period, the SDCOE shall reduce any subsequent allocations by the amount equal to the overpayment [*EDC* Section 8483.8]
7. If an ASES program site stops program operations, the SDCOE will bill the agency for the amount of the overpayment. If payment is not received within three months of the billing invoice date, any overpayment will be withheld from the next payment to the district.
8. District shall submit quarterly expenditure reports and program reports (including evaluation reports) as required.

9. **FAILURE TO SUBMIT A FINAL EXPENDITURE REPORT BY NOVEMBER 15, 2024 WILL RESULT IN A BILLING FROM THE CDE FOR THE ENTIRE AMOUNT OF ANY GRANT FUNDS ADVANCED AND POSSIBLE ADJUSTMENT OF ANY SUBSEQUENT YEARS' GRANT (S).**
10. District shall comply with the General Conditions and District Assurances specified in this MOA.
11. This award is made contingent upon the availability of funds. If the Legislature takes action to reduce or defer the funding upon which this award is based, then this award will be amended accordingly.
12. The CDE GRANT NO., FY, PCA, VENDOR NO., and SUFFIX as specified below will be used on all communications:

**CDE GRANT NO. 37-24239-10371-EZ FY 23/24: PCA: 24239
VENDOR NO. 10371: SUFFIX NO. EZ**

2. TERM OF AGREEMENT

According to the terms of the ASES Program (ASES) grant, this Agreement shall be effective from the period commencing July 1, 2023, and ending September 30, 2024, unless sooner terminated by the SDCOE as provided in the section of this Agreement entitled "Termination." Upon expiration or termination of this Agreement, the District shall return to the SDCOE any and all equipment, documents or materials and all copies made thereof which the District received from the SDCOE or produced for the SDCOE for the purposes of this Agreement.

3. TERMINATION

This agreement may be terminated with or without cause by SDCOE. Termination without cause shall be effective only upon thirty (30) days' written notice to the District. During said thirty-day period the District shall continue services in accordance with this Agreement. The District shall submit a final expenditure report within 60 days of termination and, upon approval by the SDCOE, the SDCOE shall pay District the sums earned for the services actually performed prior to the effective date of termination and other costs reasonably incurred by District to implement the termination.

This Agreement may also be terminated by either party for cause in the event of a material breach of this Agreement, misrepresentation in connection with the formation of this Agreement or the performance of services, or the failure to perform services. Termination for cause shall be effected by delivery of written notice by the non-breaching party. It is understood and agreed the termination may be delivered via email and shall be effective on the date sent.

The SDCOE may, by written notice to the District, terminate this agreement in whole or in part at any time because of the failure of the District to fulfill its contractual obligations as outlined in this Agreement. Upon receipt of such notice, District shall:

- a) Immediately discontinue all services affected (unless the notice directs otherwise) and

- b) Deliver to the SDCOE all information and material as may have been involved in the provision of services in the performance of this agreement, whether completed or in process. Termination of this agreement shall be as of the date of receipt by the District of such notice.

If the termination is due to the failure of the District to fulfill its contractual obligations, SDCOE may take over the services, and complete the services by contract or otherwise. In such a case, the District shall be liable to the SDCOE for any reasonable costs or damages occasioned to SDCOE thereby.

4. COMPENSATION AND REIMBURSEMENT

The After School Education and Safety Programs (ASES) are considered direct grants and CDE shall pay grantees (SDCOE) according to the following schedule authorized in *EDC* Section 8482.4:

“The department shall allocate 65 percent of the first-year grant amount no later than 30 days after the grantee submits the grant award acceptance letter to the CDE. Of the remaining 35 percent of the grant, the CDE shall allocate 25 percent or more of the funds within the operational period of the program and may retain up to 10 percent of the total grant until all administrative requirements of the grant have been met.”

The SDCOE will retain 3% of grant funds for Countywide program coordination, technical assistance, and program support, as agreed herein and this should not be reported in the district expenditure report.

Program funds will be dispersed to the District based on the reimbursement schedule cited above in *EC* Section 8482.4. The District’s annual ASES allocation(s) **shall not exceed \$681,065.00.**

District will ONLY report expenditures up to **\$660,633.05** (97% less 3% SDCOE Administrative fee of \$20,431.95) and will receive up to a total of \$660,633.05 if the district expends all their grant allocation and is in compliance with all grant requirements. NOTE: Expenditures should align with attendance collected. District must ensure fiscal accountability based on actual program attendance and expenses.

GRANT AMOUNTS MAY BE ADJUSTED by the CDE at any time for the following reasons:

- Non-operation of program
- Non-operation of a funded grant component
- District’s inability to expend the total grant award by the September 30, 2024 final expenditure deadline
- Audit Findings or Program Compliance issues

NOTE: A reduction of grant award or repayment of expended ASES funding due to any of the conditions listed above WILL BE PAID BY DISTRICT.

All payments will be made by SDCOE subsequent to actual receipt of funds from CDE.

5. CONFIDENTIAL RELATIONSHIP

SDCOE may from time to time communicate to the District certain information to enable the District to effectively perform the services. District shall treat all such information as confidential, whether or not so identified, and shall not disclose any part thereof without the prior written consent of the SDCOE. District shall limit the use and circulation of such information, even within its own organization, to the extent necessary to perform the services. The foregoing obligation of this Paragraph 5, however, shall not apply to any part of the information that (i) has been disclosed in publicly available sources of information; (ii) is, through no fault of District, hereafter disclosed in publicly available sources of information; (iii) is now in the possession of District without any obligation of confidentiality; (iv) is required to be disclosed by operation of law; or (v) has been or is hereafter rightfully disclosed to District by a third party, but only to the extent that the use or disclosure thereof has been or is rightfully authorized by that third party.

District shall not disclose any reports, recommendations, conclusions or other results of the services or the existence of the subject matter of this Agreement without the prior written consent of the SDCOE. In its performance hereunder, the District shall comply with all legal obligations it may now or hereafter have respecting the information or other property of any other person, firm or corporation.

6. PUBLIC RECORDS ACT

District acknowledges that the SDCOE is a public agency subject to the requirements of the California Public Records Act Cal. Gov. Code section 7920.000 et seq. The SDCOE acknowledges that the District may submit information that the District considers confidential, proprietary, or trade secret information pursuant the Uniform Trade Secrets Act (Cal. Civ. Code section 3426 et seq.), or otherwise protected from disclosure pursuant to an exemption to the California Public Records Act (Government Code sections 7927.500 - 7929.010 and section 7922.000 et seq.). District acknowledges that the SDCOE may submit to the District information that the SDCOE considers confidential or proprietary or protected from disclosure pursuant to exemptions to the California Public Records Act (Government Code sections 7927.500 - 7929.010 and section 7922.000 et seq.). Upon request or demand of any third person or entity not a party to this Agreement ("Requestor") for production, inspection and/or copying of information designated by a Disclosing Party as Confidential Information, the Receiving Party as soon practical but within three (3) days of receipt of the request, shall notify the Disclosing Party that such request has been made, by telephone call, letter sent via email and/or by US Mail to the address and email listed within the notices section of this Agreement. The Disclosing Party shall be solely responsible for taking whatever legal steps are necessary to protect information deemed by it to be Confidential Information and to prevent release of information to the Requestor by the Receiving Party. If the Disclosing Party takes no such action, after receiving the foregoing notice from the Receiving Party, the Receiving Party shall be permitted to comply with the Requestor's demand and is not required to defend against it.

7. OWNERSHIP OF DOCUMENTS

All memoranda, reports, plans, specifications, maps and other documents prepared or obtained under the terms of this Agreement by or for SDCOE shall be the property of SDCOE and shall be delivered to SDCOE by the District upon demand.

Services provided to the SDCOE, and all participating schools therein, and all related materials including, but not limited to; audio; video; images; District's name, slogans, quotes, writings; posters; and any other related materials which are exclusively owned by the District will remain the exclusive property of the District.

8. FUND AVAILABILITY

Funding of this Agreement, if funded by the SDCOE, is contingent upon appropriation and availability of funds. Work performed in advance of Agreement approval shall be done at the sole risk of the District. In the event the funds are not available by operation of law or budget determination, the SDCOE shall have the exclusive right to withhold funding.

9. DATA PRIVACY AND PROTECTION

All SDCOE content/data (to include but not limited to: students, teachers, interns, aides, Principals, and other administrative personnel) involved in this agreement shall continue to be the property of and under the control of the SDCOE.

All content/data created by the SDCOE or by its students or personnel using the service(s) provided by the District pursuant to this Agreement will cease to be retained by the District at the conclusion of this Agreement and will, in fact, be removed from the District's records.

The District will not use any information in a student or personnel record for any purposes other than those required or specifically permitted by this Agreement. Any other use of the SDCOE's student and personnel information will not be undertaken without the express, written consent of the SDCOE.

The District certifies it uses and adheres to the following methods to ensure the privacy and security of all electronically stored information:

- transmission of student and personnel information is always via secure protocols (SFTP, SSL and/or encryption)
- no data transmission occurs via email
- student and personnel data are stored in an encrypted form and programmatic access to that data is done using secure coding standards without visible account or password information
- all server systems including data storage are maintained in a locked, secure, environmentally controlled facility

- all server systems have been hardened with industry standard recommended measures for security protection

The District will notify the SDCOE within 24 hours of the District discovering an unauthorized access or disclosure of SDCOE data.

The District and the SDCOE will work together to ensure compliance with FERPA regulations as applicable.

10. NO ASSIGNMENTS

Neither any part nor all of this Agreement may be assigned or subcontracted, except as otherwise specifically provided herein, or to which the SDCOE, in its sole discretion, consents to in advance thereof in writing. Any assignment or subcontracting in violation of this provision shall be void.

11. AUDIT

District agrees to maintain and preserve until five (5) years after termination of the Agreement with the SDCOE and to permit the State of California or any of its duly authorized representatives, to have access to and to examine and audit any pertinent books, documents, papers, and records related to this Agreement.

12. INDEPENDENT DISTRICT

It is expressly understood that at all times, while rendering the services described herein, and in complying with any terms and conditions of this Agreement, District is acting as an independent District and not as an officer, agent, or employee of the SDCOE. Except as the SDCOE may specify in writing, District shall have no authority, express or implied, to act on behalf of the SDCOE in any capacity whatsoever as an agent. District shall have no authority, express or implied, to bind the SDCOE to any obligation whatsoever.

13. INSURANCE REQUIREMENTS

The District shall maintain and shall cause each Subcontractor to maintain Public Liability and Property Damage Insurance to protect them and the SDCOE from all claims for personal injury, including accidental death, as well as from all claims for property damage arising from the operations under this Agreement. The minimum amounts of such insurance shall be as hereinafter set forth.

Required Amounts of Insurance:

General Liability	\$1,000,000
Bodily Injury and	Amount
Comprehensive form - Property Damage	

Products/Completed
Operations

Auto Liability	\$1,000,000/\$300,000
Bodily Injury and Comprehensive form - Property Damage Owned, Non-owned Hired Combined	Amount

The District shall file, with the SDCOE, Certificates of Insurance indicating a thirty-day (30) cancellation notice and naming the **SAN DIEGO COUNTY SUPERINTENDENT OF SCHOOLS** as an additional insured.

14. WORKERS' COMPENSATION

The District shall provide workers' compensation insurance or shall self-insure their services in compliance with provisions of Section 3700 of the Labor Code of the State of California. A Certificate of Insurance may be provided, providing for such, or District shall sign and file on District letterhead stationery with the SDCOE the following certificate:

"I am aware of the provisions of Section 3700 of the Labor Code which requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provision of that Code, and I will comply with such provision before commencing the performance of the work of this Agreement."

15. TUBERCULOSIS CLEARANCE

District shall certify in writing that District's employees, volunteers, and subcontractors receive clearance for TB. In such cases where the District does not have in-person contact with students, the District shall not be required to obtain TB clearance.

16. PUPIL SAFETY / SCHOOL SAFETY ACT

California Education Code Sections 33192, 33195, and 45125 et al., provides that if the employees of any entity that has a contract with a school district may have any contact with pupils, those employees shall submit or have submitted their fingerprints in a manner authorized by the Department of Justice. The District shall comply with all provisions of Education Code section 45125.1 et seq., as applicable to the determination below. The SDCOE Expanded Learning Director has determined that contact (including electronic contact) with pupils may occur under the terms of this Agreement. Fingerprinting and certification will be required by the District. No work may take place until the requirements of Education Code section 45125.1 have been met.

17. INDEMNIFICATION

To the fullest extent allowable by law, District agrees to hold harmless, defend, and to indemnify the SDCOE, accept any and all responsibility for loss or damage to any person or entity, including SDCOE, and to indemnify, hold harmless, and release SDCOE, its officers, agents, and employees from and against any actions, claims, damages, liabilities, disabilities, or expenses, that may be asserted by any person or entity, including District, that arise out of, pertain to, or relate to the District's or its agents', employees', contractors', subcontractors', or invitees' performance or obligations under this Agreement. District agrees to provide a complete defense for any claim or action brought against SDCOE based upon a claim relating to such District's or its agents', employees', contractors', subcontractors', or invitees' performance or obligations under this Agreement. District's obligations under this Section apply whether or not there is concurrent negligence on SDCOE's part, but to the extent required by law, excluding liability due to SDCOE's conduct. SDCOE shall have the right to select its legal counsel at District's expense, subject to District's approval, which shall not be unreasonably withheld. This indemnification obligation is not limited in any way by any limitation on the amount or type of damages or compensation payable to or for District or its agents under workers' compensation acts, disability benefits acts, or other employee benefit acts.

18. TOBACCO-FREE FACILITY

The SDCOE is a tobacco-free facility. Tobacco use (smoked or smokeless) is prohibited at all times on all areas of or within SDCOE property.

19. NOTICES

All notices, legal or otherwise, shall be provided as follows:

SDCOE: Liza Flowers
Director, Expanded Learning
800 National City Boulevard
National City, CA 91950
858-298-2079
liza.flowers@sdcoe.net

With copy to: Deputy Superintendent/Chief Business Officer
SDCOE Legal Services
6401 Linda Vista Rd
San Diego, CA 92111

DISTRICT: Jerred Murphy
Manager, Extended Student Services
12335 Woodside Ave.
619-390-2532
jmurphy@lsusd.net

20. AMENDMENT

No oral or other agreements or understandings shall be effective to modify or alter the written terms of this Agreement. This Agreement may be amended or modified only by a written instrument signed by the SDCOE and by a duly authorized representative of the District.

21. GOVERNING LAW/VENUE

In the event of litigation, the Agreement and related matters shall be governed by and construed in accordance with the laws of the State of California. Venue shall be with the appropriate state or federal court located in San Diego County.

22. MEDIATION

In the event of any dispute, claim, question, or agreement or disagreement arising from or relating to this Agreement or breach thereof, the parties hereto shall use their best efforts to settle the dispute, claim, question, or disagreement. To this effect, they shall consult and negotiate with each other in good faith, recognize their mutual interests, and attempt to reach a just and equitable solution satisfactory to both parties. If the parties are unable to resolve the issue(s) within a period of thirty (30) days, then upon notice of either party to the other, all disputes, claims, questions, or disagreements shall be resolved through mediation. The parties will select a mediator by their mutual agreement, within 30 days. If there can be no such agreement, each party will submit a list of five mediator choices to the other, rank ordered by preference. The mediator will then be selected based on a further discussion, unless an individual is on both lists and then that person would have preference. Each party shall bear its own costs, including without limitation one half of the cost of the fees and costs of mediation.

23. COMPLIANCE WITH LAW

District shall be subject to, and shall comply with, all federal, state, and local laws and regulations applicable with respect to its performance under this Agreement including, but not limited to: licensing, employment, and purchasing practices, wages, hours, and conditions of employment, including non-discrimination requirements.

To the extent that this Agreement may be funded by fiscal assistance from another governmental entity, the District and any subcontractor(s) shall comply with all applicable rules and regulations to which SDCOE is bound by the terms of such fiscal assistance program.

24. DEBARMENT, SUSPENSION OR INELIGIBILITY CLAUSE

By signing this Agreement, the District certifies that the District, and any of its principles and/or subcontractors:

- i. Are not presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any federal agency, and;

ii. Have not, within a three-year period preceding this Agreement, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with containing, attempting to obtain, or performing a public (federal, state or local) transaction or contract under a public transaction; violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property. District certifies that no employee, officer, agent, or subcontractor who may come in contact with students in performance of this Agreement, has been convicted of a serious or violent felony.

25. AUTHORIZATION TO PERFORM SERVICES

District is not authorized to perform services or incur costs under this agreement until executed by both the District and approved by signature of the SDCOE Superintendent of Schools or his designee, the Deputy Superintendent, Chief Business Officer.

26. COUNTERPARTS

This Agreement (and any amendments) may be executed in multiple counterparts, each of which shall be deemed an original, but all of which, together, shall constitute one and the same instrument. Documents delivered electronically shall be valid and binding.

27. SEVERABILITY

If a court of competent jurisdiction finds or rules that any provision of this Agreement is invalid, void, or unenforceable, the provisions of this Agreement not so adjudged shall remain in full force and effect. The invalidity in whole or in part of any provision of this Agreement shall not void or affect the validity of any other provision of this Agreement.

28. ENTIRE AGREEMENT

This Agreement represents the entire Agreement and understandings of the parties hereto and no prior writings, conversations or representations of any nature shall be deemed to vary the provisions hereof. This Agreement may not be amended in any way except by a writing duly executed by both parties hereto.

By signing this Memorandum of Agreement below, I certify that I have the authority to sign on behalf of the **Lakeside Union Elementary**. I also certify that I have read this Memorandum of Agreement in its entirety, including all California Education Code citations and ASES Grant Award Assurances, as provided.

Initial: LD

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be duly executed, such parties acting by their representatives being thereunto duly authorized.

**SAN DIEGO COUNTY
SUPERINTENDENT OF SCHOOLS**

Michael Simonson
Michael Simonson (Apr 11, 2024 11:04 PDT)

By (Authorized Signature)

Michael Simonson
Name (Type or Print)

Deputy Superintendent, Chief Business Officer
Title

Apr 11, 2024
Date

**LAKESIDE UNION
ELEMENTARY**

Lisa Davis
Lisa Davis (Mar 26, 2024 07:43 PDT)

By (Authorized Signature)

Lisa Davis
Name (Type or Print)

Assistant Superintendent
Title

Mar 26, 2024
Date

EXHIBIT A
Funding Status Per School



2023-2024

Grant Definition	Grant Number	CDS Code	District	School Name	Components	Amount Awarded
ASES (231)	37-24239-10371-EZ	37681896038350	Lakeside Union Elementary	Lakeside Middle	After School Base	\$182,664.52
ASES (231)	37-24239-10371-EZ	37681896038350	Lakeside Union Elementary	Lakeside Middle	After School Supplemental	\$10,988.08
ASES (231)	37-24239-10371-EZ	37681896110092	Lakeside Union Elementary	Lemon Crest Elementary	After School Base	\$152,612.13
ASES (231)	37-24239-10371-EZ	37681896110092	Lakeside Union Elementary	Lemon Crest Elementary	Before School Base	\$50,870.71
ASES (231)	37-24239-10371-EZ	37681896038376	Lakeside Union Elementary	Lindo Park Elementary	After School Base	\$152,612.13
ASES (231)	37-24239-10371-EZ	37681896038376	Lakeside Union Elementary	Lindo Park Elementary	Before School Base	\$50,870.71
ASES (231)	37-24239-10371-EZ	37681896085047	Lakeside Union Elementary	Tierra del Sol Middle	After School Base	\$69,458.64
ASES (231)	37-24239-10371-EZ	37681896085047	Lakeside Union Elementary	Tierra del Sol Middle	After School Supplemental	\$10,988.08
				Total		\$681,065.00
				Admin Fee		\$20,431.95
				Grant Amount, Less 3%		\$660,633.05

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: May 9, 2024

Agenda Item:

April 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:

- | | |
|--|--|
| <input checked="" type="checkbox"/> Informational | <input 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 | |


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 _____

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, Field Trips					\$ 3,126.55						\$ 3,126.55
	Multiple Field Trips from 10/20/23 - 3/18/24								\$ 1,496.25			\$ 1,496.25
Lakeside Middle School	6th Grade Camp			\$ 2,690.00								\$ 2,690.00
Lemon Crest	From PTA Council for 6th Grade Camp						\$ 900.00					\$ 900.00
Lindo Park	To Donation Acct Matt's & Supplies						\$ 2,000.00					\$ 2,000.00
	2 FTs - SD Zoo & Reuben H. Fleet Sci. Ctr.								\$ 1,142.50			\$ 1,142.50
	New Laminator	\$ 3,151.00										\$ 3,151.00
Riverview	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					\$ 900.00
	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
Wintergardens	Playground Coordinator				\$ 7,097.00							\$ 7,097.00
	Fall Festival Shuttle Bus to RV						\$ 682.50					\$ 682.50
	Field Trip Transportation Charges- SD Zoo							\$ 1,125.00				\$ 1,125.00
	Jog-a-Thon (Nov) Shuttle to RV							\$ 300.00				\$ 300.00
	Correct Nov. Donation - Reimb to PTA			\$ (390.00)								\$ (390.00)
		\$ 14,900.19	\$ 716.00	\$ 18,037.00	\$ 7,097.00	\$ 4,212.55	\$ 12,206.50	\$ 2,396.00	\$ 2,638.75	\$ -	\$ -	\$ 62,203.99

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: 5/9/24

Agenda Item:

Adoption of K-8 History Social Studies Curriculum

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

Adoption is requested of the TCI curriculum for all students K-8. As presented in last month's board meeting, an 18-month pilot process was conducted whereby several curriculums were considered. TCI was selected by both elementary and middle school pilot teachers.

Fiscal Impact (Cost):

\$532,547

Funding Source:

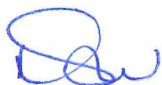
Art, Music, Instructional Materials Block Grant

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: Click here to enter text. |
| <input checked="" type="checkbox"/> Adoption | |
-

Originating Department/School: Ed Services

Submitted/Recommended By:  **Approved for Submission to the Governing Board:**



Dr. Natalie Winspear, Asst Superintendent



Dr. Rhonda Taylor, Superintendent



Quote #: Q-27243-1

Date: 3/26/2024

Expires On: 5/24/2024

Prepared By: Christy Sanders

Email: csanders@teachtci.com

Phone: (800) 497-6138

Quote for:

Lakeside Union School District
Michelle Perkins
mperkins@lsusd.net

Ship to:

Lakeside Union School District
12335 Woodside Ave
Lakeside, CA 92040
Ship to district warehouse

Lindo Park Elementary School

12824 Lakeshore Dr Lakeside, CA 92040

Product Code	Product Name	Product Type	List Price	Customer Price	Quantity	Extended Price
EL-SS-TL-06	Elementary (K-5) Social Studies: Teacher License (6 Yrs)	Digital	\$325.00	\$0.00	17	\$0.00
250-8	SSA! Me and My World: Teacher's Guide	Print English	\$149.00	\$0.00	3	\$0.00
037-1	SSA! Me and My World: Picture Cards	Print English	\$149.00	\$0.00	3	\$0.00
CA-0340-6	SSA! Me and My World: Student Materials (6 Yrs)	Bundle English	\$77.00	\$77.00	56	\$4,312.00
ISN-0357-2	SSA! Me and My World: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	56	\$896.00
251-5	SSA! My School and Family: Teacher's Guide	Print English	\$149.00	\$0.00	4	\$0.00
092-0	SSA! My School and Family: Picture Cards	Print English	\$149.00	\$0.00	4	\$0.00
CA-0890-6	SSA! My School and Family: Student Materials (6 Yrs)	Bundle English	\$77.00	\$77.00	56	\$4,312.00
ISN-0906-2	SSA! My School and Family: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	56	\$896.00
252-2	SSA! My Community: Teacher's Guide	Print English	\$149.00	\$0.00	3	\$0.00
099-9	SSA! My Community: Picture Cards	Print English	\$149.00	\$0.00	3	\$0.00
CA-0968-6	SSA! My Community: Student Materials (6 Yrs)	Bundle English	\$77.00	\$77.00	57	\$4,389.00
ISN-0975-2	SSA! My Community: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	57	\$912.00
253-9	SSA! California's Communities: Teacher's Guide	Print English	\$149.00	\$0.00	3	\$0.00
477-5	SSA! California's Communities: Picture Cards	Print English	\$149.00	\$0.00	3	\$0.00
CA-4751-6	SSA! California's Communities: Student Materials (6 Yrs)	Bundle English	\$83.00	\$83.00	59	\$4,897.00
ISN-4768-2	SSA! California's Communities: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	59	\$944.00
254-6	SSA! California's Promise: Teacher's Guide	Print English	\$149.00	\$0.00	3	\$0.00
484-3	SSA! California's Promise: Picture Cards	Print English	\$149.00	\$0.00	3	\$0.00
CA-4829-6	SSA! California's Promise: Student Materials (6 Yrs)	Bundle English	\$83.00	\$83.00	72	\$5,976.00

Product Code	Product Name	Product Type	List Price	Customer Price	Quantity	Extended Price
ISN-4836-2	SSA! California's Promise: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	72	\$1,152.00
255-3	SSA! America's Past: Teacher's Guide	Print English	\$149.00	\$0.00	1	\$0.00
997-8	SSA! America's Past: Picture Cards	Print English	\$149.00	\$0.00	1	\$0.00
CA-9947-6	SSA! America's Past: Student Materials (6 Yrs)	Bundle English	\$83.00	\$83.00	72	\$5,976.00
ISN-9954-2	SSA! America's Past: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	72	\$1,152.00
Lindo Park Elementary School Shipping:			\$1,790.70	Lindo Park Elementary School TOTAL:		\$35,814.00

Lakeview Elementary School

9205 Lakeview Rd Lakeside, CA 92040

Product Code	Product Name	Product Type	List Price	Customer Price	Quantity	Extended Price
EL-SS-TL-06	Elementary (K-5) Social Studies: Teacher License (6 Yrs)	Digital	\$325.00	\$0.00	28	\$0.00
250-8	SSA! Me and My World: Teacher's Guide	Print English	\$149.00	\$0.00	4	\$0.00
037-1	SSA! Me and My World: Picture Cards	Print English	\$149.00	\$0.00	2	\$0.00
CA-0340-6	SSA! Me and My World: Student Materials (6 Yrs)	Bundle English	\$77.00	\$77.00	45	\$3,465.00
ISN-0357-2	SSA! Me and My World: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	45	\$720.00
122-8	SSA! Me and My World: Spanish Picture Cards	Print Spanish	\$149.00	\$0.00	2	\$0.00
TB-8445-6	SSA! Me and My World: Spanish Student Bundle (6 Yrs)	Bundle Spanish	\$77.00	\$77.00	53	\$4,081.00
ISN-0364-2	SSA! Me and My World: Spanish Notebook Subscription (2 Yrs)	Bundle Spanish	\$16.00	\$16.00	53	\$848.00
251-5	SSA! My School and Family: Teacher's Guide	Print English	\$149.00	\$0.00	4	\$0.00
092-0	SSA! My School and Family: Picture Cards	Print English	\$149.00	\$0.00	2	\$0.00
CA-0890-6	SSA! My School and Family: Student Materials (6 Yrs)	Bundle English	\$77.00	\$77.00	45	\$3,465.00
ISN-0906-2	SSA! My School and Family: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	45	\$720.00
123-5	SSA! My School and Family: Spanish Picture Cards	Print Spanish	\$149.00	\$0.00	2	\$0.00
TB-8452-6	SSA! My School and Family: Spanish Student Bundle (6 Yrs)	Bundle Spanish	\$77.00	\$77.00	51	\$3,927.00
ISN-0913-2	SSA! My School and Family: Spanish Notebook Subscription (2 Yrs)	Print Spanish	\$16.00	\$16.00	51	\$816.00
252-2	SSA! My Community: Teacher's Guide	Print English	\$149.00	\$0.00	4	\$0.00
099-9	SSA! My Community: Picture Cards	Print English	\$149.00	\$0.00	4	\$0.00
CA-0968-6	SSA! My Community: Student Materials (6 Yrs)	Bundle English	\$77.00	\$77.00	100	\$7,700.00
ISN-0975-2	SSA! My Community: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	100	\$1,600.00
253-9	SSA! California's Communities: Teacher's Guide	Print English	\$149.00	\$0.00	6	\$0.00
477-5	SSA! California's Communities: Picture Cards	Print English	\$149.00	\$0.00	4	\$0.00
CA-4751-6	SSA! California's Communities: Student Materials (6 Yrs)	Bundle English	\$83.00	\$83.00	83	\$6,889.00

Product Code	Product Name	Product Type	List Price	Customer Price	Quantity	Extended Price
ISN-4768-2	SSA! California's Communities: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	83	\$1,328.00
125-9	SSA! California's Communities: Spanish Picture Cards	Print Spanish	\$149.00	\$0.00	2	\$0.00
TB-4805-6	SSA! California's Communities: Spanish Student Bundle (6 Yrs)	Bundle Spanish	\$83.00	\$83.00	46	\$3,818.00
ISN-4799-2	SSA! California's Communities: Spanish Notebook Subscription (2 Yrs)	Print Spanish	\$16.00	\$16.00	46	\$736.00
254-6	SSA! California's Promise: Teacher's Guide	Print English	\$149.00	\$0.00	5	\$0.00
484-3	SSA! California's Promise: Picture Cards	Print English	\$149.00	\$0.00	5	\$0.00
CA-4829-6	SSA! California's Promise: Student Materials (6 Yrs)	Bundle English	\$83.00	\$83.00	102	\$8,466.00
ISN-4836-2	SSA! California's Promise: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	102	\$1,632.00
255-3	SSA! America's Past: Teacher's Guide	Print English	\$149.00	\$0.00	5	\$0.00
997-8	SSA! America's Past: Picture Cards	Print English	\$149.00	\$0.00	3	\$0.00
CA-9947-6	SSA! America's Past: Student Materials (6 Yrs)	Bundle English	\$83.00	\$83.00	77	\$6,391.00
ISN-9954-2	SSA! America's Past: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	77	\$1,232.00
127-3	SSA! America's Past: Spanish Picture Cards	Print Spanish	\$149.00	\$0.00	2	\$0.00
TB-8490-6	SSA! America's Past: Spanish Student Bundle (6 Yrs)	Bundle Spanish	\$83.00	\$83.00	40	\$3,320.00
ISN-9961-2	SSA! America's Past: Spanish Notebook Subscription (2 Yrs)	Print Spanish	\$16.00	\$16.00	40	\$640.00

Lakeview Elementary School Shipping:

\$3,089.70

Lakeview Elementary School TOTAL:

\$61,794.00

Lemon Crest Elementary School 12463 Lemon Crest Dr Lakeside, CA 92040

Product Code	Product Name	Product Type	List Price	Customer Price	Quantity	Extended Price
EL-SS-TL-06	Elementary (K-5) Social Studies: Teacher License (6 Yrs)	Digital	\$325.00	\$0.00	28	\$0.00
250-8	SSA! Me and My World: Teacher's Guide	Print English	\$149.00	\$0.00	5	\$0.00
037-1	SSA! Me and My World: Picture Cards	Print English	\$149.00	\$0.00	5	\$0.00
CA-0340-6	SSA! Me and My World: Student Materials (6 Yrs)	Bundle English	\$77.00	\$77.00	70	\$5,390.00
ISN-0357-2	SSA! Me and My World: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	70	\$1,120.00
251-5	SSA! My School and Family: Teacher's Guide	Print English	\$149.00	\$0.00	6	\$0.00
092-0	SSA! My School and Family: Picture Cards	Print English	\$149.00	\$0.00	6	\$0.00
CA-0890-6	SSA! My School and Family: Student Materials (6 Yrs)	Bundle English	\$77.00	\$77.00	70	\$5,390.00
ISN-0906-2	SSA! My School and Family: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	70	\$1,120.00
252-2	SSA! My Community: Teacher's Guide	Print English	\$149.00	\$0.00	5	\$0.00
099-9	SSA! My Community: Picture Cards	Print English	\$149.00	\$0.00	5	\$0.00

Product Code	Product Name	Product Type	List Price	Customer Price	Quantity	Extended Price
CA-0968-6	SSA! My Community: Student Materials (6 Yrs)	Bundle English	\$77.00	\$77.00	71	\$5,467.00
ISN-0975-2	SSA! My Community: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	71	\$1,136.00
253-9	SSA! California's Communities: Teacher's Guide	Print English	\$149.00	\$0.00	4	\$0.00
477-5	SSA! California's Communities: Picture Cards	Print English	\$149.00	\$0.00	4	\$0.00
CA-4751-6	SSA! California's Communities: Student Materials (6 Yrs)	Bundle English	\$83.00	\$83.00	73	\$6,059.00
ISN-4768-2	SSA! California's Communities: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	73	\$1,168.00
254-6	SSA! California's Promise: Teacher's Guide	Print English	\$149.00	\$0.00	4	\$0.00
484-3	SSA! California's Promise: Picture Cards	Print English	\$149.00	\$0.00	4	\$0.00
CA-4829-6	SSA! California's Promise: Student Materials (6 Yrs)	Bundle English	\$83.00	\$83.00	78	\$6,474.00
ISN-4836-2	SSA! California's Promise: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	78	\$1,248.00
255-3	SSA! America's Past: Teacher's Guide	Print English	\$149.00	\$0.00	4	\$0.00
997-8	SSA! America's Past: Picture Cards	Print English	\$149.00	\$0.00	4	\$0.00
CA-9947-6	SSA! America's Past: Student Materials (6 Yrs)	Bundle English	\$83.00	\$83.00	79	\$6,557.00
ISN-9954-2	SSA! America's Past: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	79	\$1,264.00

Lemon Crest Elementary School Shipping:

\$2,119.65

Lemon Crest
Elementary School
TOTAL:

\$42,393.00

Lakeside Farms Elem School

11915 Lakeside Ave Lakeside, CA 92040

Product Code	Product Name	Product Type	List Price	Customer Price	Quantity	Extended Price
EL-SS-TL-06	Elementary (K-5) Social Studies: Teacher License (6 Yrs)	Digital	\$325.00	\$0.00	33	\$0.00
250-8	SSA! Me and My World: Teacher's Guide	Print English	\$149.00	\$0.00	6	\$0.00
037-1	SSA! Me and My World: Picture Cards	Print English	\$149.00	\$0.00	6	\$0.00
CA-0340-6	SSA! Me and My World: Student Materials (6 Yrs)	Bundle English	\$77.00	\$77.00	104	\$8,008.00
ISN-0357-2	SSA! Me and My World: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	104	\$1,664.00
251-5	SSA! My School and Family: Teacher's Guide	Print English	\$149.00	\$0.00	6	\$0.00
092-0	SSA! My School and Family: Picture Cards	Print English	\$149.00	\$0.00	6	\$0.00
CA-0890-6	SSA! My School and Family: Student Materials (6 Yrs)	Bundle English	\$77.00	\$77.00	104	\$8,008.00
ISN-0906-2	SSA! My School and Family: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	104	\$1,664.00
252-2	SSA! My Community: Teacher's Guide	Print English	\$149.00	\$0.00	6	\$0.00
099-9	SSA! My Community: Picture Cards	Print English	\$149.00	\$0.00	6	\$0.00
CA-0968-6	SSA! My Community: Student Materials (6 Yrs)	Bundle English	\$77.00	\$77.00	111	\$8,547.00

Product Code	Product Name	Product Type	List Price	Customer Price	Quantity	Extended Price
ISN-0975-2	SSA! My Community: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	111	\$1,776.00
253-9	SSA! California's Communities: Teacher's Guide	Print English	\$149.00	\$0.00	6	\$0.00
477-5	SSA! California's Communities: Picture Cards	Print English	\$149.00	\$0.00	6	\$0.00
CA-4751-6	SSA! California's Communities: Student Materials (6 Yrs)	Bundle English	\$83.00	\$83.00	110	\$9,130.00
ISN-4768-2	SSA! California's Communities: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	110	\$1,760.00
254-6	SSA! California's Promise: Teacher's Guide	Print English	\$149.00	\$0.00	7	\$0.00
484-3	SSA! California's Promise: Picture Cards	Print English	\$149.00	\$0.00	7	\$0.00
CA-4829-6	SSA! California's Promise: Student Materials (6 Yrs)	Bundle English	\$83.00	\$83.00	110	\$9,130.00
ISN-4836-2	SSA! California's Promise: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	110	\$1,760.00
255-3	SSA! America's Past: Teacher's Guide	Print English	\$149.00	\$0.00	2	\$0.00
997-8	SSA! America's Past: Picture Cards	Print English	\$149.00	\$0.00	2	\$0.00
CA-9947-6	SSA! America's Past: Student Materials (6 Yrs)	Bundle English	\$83.00	\$83.00	98	\$8,134.00
ISN-9954-2	SSA! America's Past: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	98	\$1,568.00

Lakeside Farms Elem School Shipping:

\$3,057.45

Lakeside Farms Elem School TOTAL:

\$61,149.00

Winter Gardens Elem School

8501 Pueblo Rd Lakeside, CA 92040

Product Code	Product Name	Product Type	List Price	Customer Price	Quantity	Extended Price
EL-SS-TL-06	Elementary (K-5) Social Studies: Teacher License (6 Yrs)	Digital	\$325.00	\$0.00	11	\$0.00
250-8	SSA! Me and My World: Teacher's Guide	Print English	\$149.00	\$0.00	6	\$0.00
037-1	SSA! Me and My World: Picture Cards	Print English	\$149.00	\$0.00	1	\$0.00
CA-0340-6	SSA! Me and My World: Student Materials (6 Yrs)	Bundle English	\$77.00	\$77.00	23	\$1,771.00
ISN-0357-2	SSA! Me and My World: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	23	\$368.00
122-8	SSA! Me and My World: Spanish Picture Cards	Print Spanish	\$149.00	\$0.00	5	\$0.00
TB-8445-6	SSA! Me and My World: Spanish Student Bundle (6 Yrs)	Bundle Spanish	\$77.00	\$77.00	108	\$8,316.00
ISN-0364-2	SSA! Me and My World: Spanish Notebook Subscription (2 Yrs)	Bundle Spanish	\$16.00	\$16.00	108	\$1,728.00
251-5	SSA! My School and Family: Teacher's Guide	Print English	\$149.00	\$0.00	5	\$0.00
092-0	SSA! My School and Family: Picture Cards	Print English	\$149.00	\$0.00	1	\$0.00
CA-0890-6	SSA! My School and Family: Student Materials (6 Yrs)	Bundle English	\$77.00	\$77.00	21	\$1,617.00
ISN-0906-2	SSA! My School and Family: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	21	\$336.00
123-5	SSA! My School and Family: Spanish Picture Cards	Print Spanish	\$149.00	\$0.00	4	\$0.00

Product Code	Product Name	Product Type	List Price	Customer Price	Quantity	Extended Price
TB-8452-6	SSA! My School and Family: Spanish Student Bundle (6 Yrs)	Bundle Spanish	\$77.00	\$77.00	108	\$8,316.00
ISN-0913-2	SSA! My School and Family: Spanish Notebook Subscription (2 Yrs)	Print Spanish	\$16.00	\$16.00	108	\$1,728.00

Winter Gardens Elem School Shipping:

\$1,209.00

Winter Gardens Elem School TOTAL:

\$24,180.00

Riverview Elementary School 9308 Winter Gardens Blvd Lakeside, CA 92040

Product Code	Product Name	Product Type	List Price	Customer Price	Quantity	Extended Price
EL-SS-TL-06	Elementary (K-5) Social Studies: Teacher License (6 Yrs)	Digital	\$325.00	\$0.00	21	\$0.00
252-2	SSA! My Community: Teacher's Guide	Print English	\$149.00	\$0.00	5	\$0.00
099-9	SSA! My Community: Picture Cards	Print English	\$149.00	\$0.00	1	\$0.00
CA-0968-6	SSA! My Community: Student Materials (6 Yrs)	Bundle English	\$77.00	\$77.00	32	\$2,464.00
ISN-0975-2	SSA! My Community: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	32	\$512.00
124-2	SSA! My Community: Spanish Picture Cards	Print Spanish	\$149.00	\$0.00	4	\$0.00
TB-8469-6	SSA! My Community: Spanish Student Bundle (6 Yrs)	Bundle Spanish	\$77.00	\$77.00	83	\$6,391.00
ISN-0982-2	SSA! My Community: Spanish Notebook Subscription (2 Yrs)	Print Spanish	\$16.00	\$16.00	83	\$1,328.00
253-9	SSA! California's Communities: Teacher's Guide	Print English	\$149.00	\$0.00	5	\$0.00
477-5	SSA! California's Communities: Picture Cards	Print English	\$149.00	\$0.00	1	\$0.00
CA-4751-6	SSA! California's Communities: Student Materials (6 Yrs)	Bundle English	\$83.00	\$83.00	39	\$3,237.00
ISN-4768-2	SSA! California's Communities: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	39	\$624.00
125-9	SSA! California's Communities: Spanish Picture Cards	Print Spanish	\$149.00	\$0.00	4	\$0.00
TB-4805-6	SSA! California's Communities: Spanish Student Bundle (6 Yrs)	Bundle Spanish	\$83.00	\$83.00	100	\$8,300.00
ISN-4799-2	SSA! California's Communities: Spanish Notebook Subscription (2 Yrs)	Print Spanish	\$16.00	\$16.00	100	\$1,600.00
254-6	SSA! California's Promise: Teacher's Guide	Print English	\$149.00	\$0.00	5	\$0.00
484-3	SSA! California's Promise: Picture Cards	Print English	\$149.00	\$0.00	1	\$0.00
CA-4829-6	SSA! California's Promise: Student Materials (6 Yrs)	Bundle English	\$83.00	\$83.00	33	\$2,739.00
ISN-4836-2	SSA! California's Promise: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	33	\$528.00
126-6	SSA! California's Promise: Spanish Picture Cards	Print Spanish	\$149.00	\$0.00	4	\$0.00
TB-4867-6	SSA! California's Promise: Spanish Student Bundle (6 Yrs)	Bundle Spanish	\$83.00	\$83.00	96	\$7,968.00
ISN-4812-2	SSA! California's Promise: Spanish Notebook Subscription (2 Yrs)	Print Spanish	\$16.00	\$16.00	96	\$1,536.00
255-3	SSA! America's Past: Teacher's Guide	Print English	\$149.00	\$0.00	6	\$0.00
997-8	SSA! America's Past: Picture Cards	Print English	\$149.00	\$0.00	2	\$0.00

Product Code	Product Name	Product Type	List Price	Customer Price	Quantity	Extended Price
CA-9947-6	SSA! America's Past: Student Materials (6 Yrs)	Bundle English	\$83.00	\$83.00	43	\$3,569.00
ISN-9954-2	SSA! America's Past: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	43	\$688.00
127-3	SSA! America's Past: Spanish Picture Cards	Print Spanish	\$149.00	\$0.00	4	\$0.00
TB-8490-6	SSA! America's Past: Spanish Student Bundle (6 Yrs)	Bundle Spanish	\$83.00	\$83.00	93	\$7,719.00
ISN-9961-2	SSA! America's Past: Spanish Notebook Subscription (2 Yrs)	Print Spanish	\$16.00	\$16.00	93	\$1,488.00

Riverview Elementary School Shipping: \$2,534.55 **Riverview Elementary School TOTAL:** \$50,691.00

Lakeside Middle School

11833 Woodside Ave Lakeside, CA 92040

Product Code	Product Name	Product Type	List Price	Customer Price	Quantity	Extended Price
MS-SS-TL-06	Middle School (6-8) Social Studies: Teacher License (6 Yrs)	Digital	\$825.00	\$0.00	11	\$0.00
256-0	HA! Ancient World: Teacher's Guide	Print English	\$149.00	\$0.00	4	\$0.00
216-0	HA! Ancient World: Placards	Print English	\$149.00	\$0.00	3	\$0.00
CA-2153-6	HA! Ancient World: Student Materials (6 Yrs)	Bundle English	\$111.00	\$111.00	190	\$21,090.00
ISN-2184-2	HA! Ancient World: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	190	\$3,040.00
134-1	HA! Ancient World: Spanish Placards	Print Spanish	\$149.00	\$0.00	1	\$0.00
TB-2207-6	HA! Ancient World: Spanish Student Bundle (6 Yrs)	Bundle Spanish	\$111.00	\$111.00	65	\$7,215.00
ISN-2191-2	HA! Ancient World: Spanish Notebook Subscription (2 Yrs)	Print Spanish	\$16.00	\$16.00	65	\$1,040.00
258-4	HA! Medieval World & Beyond: Teacher's Guide	Print English	\$149.00	\$0.00	3	\$0.00
233-7	HA! Medieval World and Beyond: Placards	Print English	\$149.00	\$0.00	2	\$0.00
CA-2320-6	HA! Medieval World and Beyond: Student Materials	Bundle English	\$111.00	\$111.00	190	\$21,090.00
ISN-2399-2	HA! Medieval World and Beyond: Notebook Subscription	Print English	\$16.00	\$16.00	190	\$3,040.00
135-8	HA! Medieval World and Beyond: Spanish Placards	Print Spanish	\$149.00	\$0.00	1	\$0.00
CA-2238-6	HA! Medieval World and Beyond: Spanish Student Materials	Bundle Spanish	\$111.00	\$111.00	65	\$7,215.00
ISN-2245-2	HA! Medieval World and Beyond (CA Edition): Spanish Notebook Subscription (2 Yrs)	Print Spanish	\$16.00	\$16.00	65	\$1,040.00
259-1	HA! The US through Industrialism: Teacher's Guide	Print English	\$149.00	\$0.00	4	\$0.00
270-2	HA! US Through Industrialism: Placards	Print English	\$149.00	\$0.00	2	\$0.00
CA-2696-6	HA! US Through Industrialism: Student Materials (6 Yrs)	Bundle English	\$111.00	\$111.00	160	\$17,760.00
ISN-2726-2	HA! US Through Industrialism: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	160	\$2,560.00
136-5	HA! US Through Industrialism: Spanish Placards	Print Spanish	\$149.00	\$0.00	2	\$0.00
TB-2740-6	HA! US Through Industrialism: Spanish Student Bundle (6 Yrs)	Bundle Spanish	\$111.00	\$111.00	65	\$7,215.00

Product Code	Product Name	Product Type	List Price	Customer Price	Quantity	Extended Price
ISN-2733-2	HA! US Through Industrialism: Spanish Notebook Subscription (2 Yrs)	Print Spanish	\$16.00	\$16.00	65	\$1,040.00

Lakeside Middle School Shipping: \$4,667.25 **Lakeside Middle School TOTAL:** \$93,345.00

Tierra Del Sol Middle School

9611 Petite Ln Lakeside, CA 92040

Product Code	Product Name	Product Type	List Price	Customer Price	Quantity	Extended Price
MS-SS-TL-06	Middle School (6-8) Social Studies: Teacher License (6 Yrs)	Digital	\$825.00	\$0.00	7	\$0.00
256-0	HA! Ancient World: Teacher's Guide	Print English	\$149.00	\$0.00	3	\$0.00
216-0	HA! Ancient World: Placards	Print English	\$149.00	\$0.00	2	\$0.00
CA-2153-6	HA! Ancient World: Student Materials (6 Yrs)	Bundle English	\$111.00	\$111.00	163	\$18,093.00
ISN-2184-2	HA! Ancient World: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	163	\$2,608.00
134-1	HA! Ancient World: Spanish Placards	Print Spanish	\$149.00	\$0.00	1	\$0.00
TB-2207-6	HA! Ancient World: Spanish Student Bundle (6 Yrs)	Bundle Spanish	\$111.00	\$111.00	76	\$8,436.00
ISN-2191-2	HA! Ancient World: Spanish Notebook Subscription (2 Yrs)	Print Spanish	\$16.00	\$16.00	76	\$1,216.00
258-4	HA! Medieval World & Beyond: Teacher's Guide	Print English	\$149.00	\$0.00	1	\$0.00
233-7	HA! Medieval World and Beyond: Placards	Print English	\$149.00	\$0.00	1	\$0.00
CA-2320-6	HA! Medieval World and Beyond: Student Materials	Bundle English	\$111.00	\$111.00	163	\$18,093.00
ISN-2399-2	HA! Medieval World and Beyond: Notebook Subscription	Print English	\$16.00	\$16.00	163	\$2,608.00
135-8	HA! Medieval World and Beyond: Spanish Placards	Print Spanish	\$149.00	\$0.00	1	\$0.00
CA-2238-6	HA! Medieval World and Beyond: Spanish Student Materials	Bundle Spanish	\$111.00	\$111.00	75	\$8,325.00
ISN-2245-2	HA! Medieval World and Beyond (CA Edition): Spanish Notebook Subscription (2 Yrs)	Print Spanish	\$16.00	\$16.00	75	\$1,200.00
259-1	HA! The US through Industrialism: Teacher's Guide	Print English	\$149.00	\$0.00	2	\$0.00
270-2	HA! US Through Industrialism: Placards	Print English	\$149.00	\$0.00	1	\$0.00
CA-2696-6	HA! US Through Industrialism: Student Materials (6 Yrs)	Bundle English	\$111.00	\$111.00	163	\$18,093.00
ISN-2726-2	HA! US Through Industrialism: Notebook Subscription (2 Yrs)	Print English	\$16.00	\$16.00	163	\$2,608.00
136-5	HA! US Through Industrialism: Spanish Placards	Print Spanish	\$149.00	\$0.00	1	\$0.00
TB-2740-6	HA! US Through Industrialism: Spanish Student Bundle (6 Yrs)	Bundle Spanish	\$111.00	\$111.00	45	\$4,995.00
ISN-2733-2	HA! US Through Industrialism: Spanish Notebook Subscription (2 Yrs)	Print Spanish	\$16.00	\$16.00	45	\$720.00

Tierra Del Sol Middle School Shipping: \$4,349.75 **Tierra Del Sol Middle School TOTAL:** \$86,995.00

TOTAL:	\$456,361.00
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Shipping (5%) \$22,818.05

Sales Tax (7.75%) \$35,367.98

Grand Total	\$514,547.03
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Gratis

Gratis offer and/or customer pricing are valid for this quote only and contingent upon purchase order total matching or exceeding the quote total. Gratis items must be included on your purchase order.

Gratis Total \$106,039.00

Terms and Conditions

Business Terms

TCI's Business Terms apply to all orders. View details at <https://www.teachtci.com/tci-business-terms>

How to Order

Please include a copy of this quote with your purchase order to expedite your order and ensure you receive the pricing quoted above. Adjustments cannot be made after the order has been fulfilled. Place orders online at <https://shop.teachtci.com> or send using one of the following options:

- Email: info@teachtci.com
- Fax: 800-343-6828
- Address: 1049 El Monte Ave Ste C #607, Mountain View CA 94040
- If paying by check, send payment to PO Box 6004, Whittier CA 90607

Download a copy of TCI's W-9 at <https://www.teachtci.com/w9>

License Contact

Set-up information for all licenses purchased will be sent to the contact email above unless otherwise noted.

Shipping

Shipping and handling fees do not apply to teacher and student license-only products.

Print Subscriptions

If your order includes multi-year subscriptions to print materials, you must receive delivery of the full annual quantity for the duration of your subscription. Any adjustments below the annual quantity cannot be used as a credit for future year shipments. Changes that exceed the original annual quantity must be accompanied by a new purchase order.

Student Journal Bundles

If your order contains fewer than 20 multi-year student journal bundles for any program, journals for the entire duration of the bundle will be shipped to you upfront.

Sales Tax

Sales tax provided is an estimate only. Actual amount will be calculated and added to the invoice based on the delivery address.



Quote #: Q-27620-2
 Date: 4/12/2024
 Expires On: 7/31/2024
 Prepared By: Christy Sanders
 Email: csanders@teachtci.com
 Phone: (800) 497-6138

Quote for:
 Lakeside Union School District
 Michelle Perkins
 mperkins@lsusd.net

Ship to:
 Lakeside Union School District
 12335 Woodside Ave
 Lakeside, CA 92040

Product Code	Product Name	Product Type	List Price	Customer Price	Quantity	Extended Price
PD-ORIENTAT ION-IP	TCI In-Person Product Orientation	Digital	\$4,500.00	\$4,500.00	4	\$18,000.00
PD-ORIENTAT ION	TCI Virtual Product Orientation	Digital	\$2,000.00	\$0.00	4	\$0.00

TOTAL:	\$18,000.00
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Shipping (5%) \$0.00

Grand Total	\$18,000.00
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Gratis

Gratis offer and/or customer pricing are valid for this quote only and contingent upon purchase order total matching or exceeding the quote total. Gratis items must be included on your purchase order.

Gratis Total \$8,000.00

Comments

8/15 k-2 and 3-5 in the am and MS in the pam 1/31 K-2, 3-5 and MS District Wide PLCs - 2 2 hour zooms with 4 trainers (gratis).

Terms and Conditions

Business Terms

TCI's Business Terms apply to all orders. View details at <https://www.teachtci.com/tci-business-terms>

How to Order

Please include a copy of this quote with your purchase order to expedite your order and ensure you receive the pricing quoted above. Adjustments cannot be made after the order has been fulfilled. Place orders online at <https://shop.teachtci.com> or send using one of the following options:

- Email: info@teachtci.com
- Fax: 800-343-6828
- Address: 1049 El Monte Ave Ste C #607, Mountain View CA 94040
- If paying by check, send payment to PO Box 6004, Whittier CA 90607

Download a copy of TCI's W-9 at <https://www.teachtci.com/w9>

License Contact

Set-up information for all licenses purchased will be sent to the contact email above unless otherwise noted.

Shipping

Shipping and handling fees do not apply to teacher and student license-only products.

Print Subscriptions

If your order includes multi-year subscriptions to print materials, you must receive delivery of the full annual quantity for the duration of your subscription. Any adjustments below the annual quantity cannot be used as a credit for future year shipments. Changes that exceed the original annual quantity must be accompanied by a new purchase order.

Student Journal Bundles

If your order contains fewer than 20 multi-year student journal bundles for any program, journals for the entire duration of the bundle will be shipped to you upfront.

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: 5/9/24

Agenda Item:

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

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

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

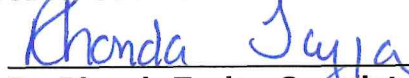
Originating Department/School: Superintendent's Office

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. (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)

An "unduplicated student" is a student who is eligible for free or reduced-price meals, who is an English learner, or who is a foster youth as defined in Education Code 42238.01. (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 students experiencing homelessness, when there are at least 30 students in the subgroup or at least 15 foster youth or 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 adoption of the LCAP and the annual update, the Board shall separately adopt a local control funding formula budget overview for parents/guardians, based on the template developed by 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.

Advisory Committees

The Board shall establish a parent advisory committee, which shall be composed of a majority of parents/guardians and shall include parents/guardians of unduplicated students 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)

The Superintendent or designee shall present the LCAP and the annual update to each of these committee(s) before 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 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.

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 Board Policy 3100 - Budget. (Education Code 52062)

Adoption 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.

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 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

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.

State

5 CCR 15494-15497

Ed. Code 17002

Ed. Code 305-306

Ed. Code 33430-33436

Ed. Code 41020

Ed. Code 41320-41322

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

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

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

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

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

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

Website

Website

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

CSBA

California Department of Education

Cross References:

Code

0000

0400

0415

0420

0420.4

0420.41

0420.41-E(1)

0430

0440

0450

0500

Description

Vision

Comprehensive Plans

Equity

School Plans/Site Councils

Charter School Authorization

Charter School Oversight

Charter School Oversight

Comprehensive Local Plan For Special Education

District Technology Plan

Comprehensive Safety Plan

Accountability

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

The Superintendent or designee shall prominently post the LCAP, any updates or revisions to the LCAP, the annual update, the IDEA Addendum as applicable, and the 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)

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: 5/9/24

Agenda Item:

Board Policy and Administrative Regulation 3311: Bids

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

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

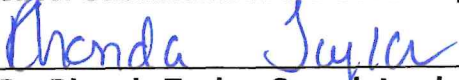
Originating Department/School: Superintendent's Office

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.

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.

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)

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

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

<i>Ed. Code 17595</i>	<i>Purchase of supplies through Department of General Services</i>
<i>Ed. Code 17602</i>	<i>Purchase of surplus property from federal agencies</i>
<i>Ed. Code 38083</i>	<i>Purchase of perishable foodstuffs and seasonal commodities</i>
<i>Ed. Code 38110-38120</i>	<i>Apparatus and supplies</i>
<i>Ed. Code 39802</i>	<i>Transportation services</i>
<i>Gov. Code 4217.10-4217.18</i>	<i>Energy conservation contracts</i>
<i>Gov. Code 4330-4334</i>	<i>California made materials</i>
<i>Gov. Code 53060</i>	<i>Special services and advice</i>
<i>Gov. Code 54201-54205</i>	<i>Purchase of supplies and equipment by local agencies</i>
<i>Gov. Code 7920.530</i>	<i>Definition of public record</i>
<i>Pub. Cont. Code 1102</i>	<i>Definition of emergency</i>
<i>Pub. Cont. Code 1103</i>	<i>Definition; responsible bidder</i>
<i>Pub. Cont. Code 12200</i>	<i>Definitions, recycled goods, materials and supplies</i>
<i>Pub. Cont. Code 2000-2002</i>	<i>Responsive bidders</i>
<i>Pub. Cont. Code 20101-20103.7</i>	<i>Public construction projects; requirements for bidding</i>
<i>Pub. Cont. Code 20103.8</i>	<i>Award of contracts</i>
<i>Pub. Cont. Code 20110-20118.4</i>	<i>Local Agency Public Construction Act; school districts</i>
<i>Pub. Cont. Code 20189</i>	<i>Bidder's security; earthquake relief</i>
<i>Pub. Cont. Code 22000-22045</i>	<i>Uniform Public Construction Cost Accounting Act</i>
<i>Pub. Cont. Code 22152</i>	<i>Recycled product procurement</i>
<i>Pub. Cont. Code 3000-3010</i>	<i>Roofing projects</i>
<i>Pub. Cont. Code 3400</i>	<i>Bid specifications</i>
<i>Pub. Cont. Code 3410</i>	<i>U.S. produce and processed foods</i>
<i>Pub. Cont. Code 4113</i>	<i>Prime contractor; subcontractor</i>
<i>Pub. Cont. Code 6102</i>	<i>Bribery of public official; voidable contract</i>
<i>Pub. Cont. Code 6610</i>	<i>Bid visits</i>

Management Resources

<i>Attorney General Opinion</i>	<i>89 Ops.Cal.Atty.Gen. 1 (2006)</i>
<i>CA Department of General Services Publication</i>	<i>Office of Public School Construction, Piggyback Contracts</i>
<i>CA Department of General Services Publication</i>	<i>Office of Public School Construction Notification to School Districts Regarding Use of Piggyback Contracts for SAB-Administered Programs, July 2022</i>
<i>CA Department of Industrial Relations Publication</i>	<i>Model Prequalification Questionnaire</i>
<i>Court Decision</i>	<i>City of Inglewood-Los Angeles County Civic Center Authority v. Superior Court, (1972) 7 Cal.3d 861</i>
<i>Court Decision</i>	<i>Great West Contractors Inc. v. Irvine Unified School District, (2010) 187 Cal.App.4th 1425</i>
<i>Court Decision</i>	<i>Konica Business Machines v. Regents of the University of California, (1988) 206 Cal.App.3d 449</i>
<i>Court Decision</i>	<i>Los Angeles Unified School District v. Great American Insurance Co., (2010) 49 Cal.4th 739</i>
<i>Court Decision</i>	<i>Marshall v. Pasadena Unified School District, (2004) 119 Cal.App.4th 1241</i>
<i>Website</i>	<i>CSBA District and County Office of Education Legal Services</i>
<i>Website</i>	<i>California Department of General Services</i>
<i>Website</i>	<i>CSBA</i>
<i>Website</i>	<i>California Department of Education</i>
<i>Website</i>	<i>California Association of School Business Officials</i>

Cross References

<u>Code</u>	<u>Description</u>
<i>0410</i>	<i>Nondiscrimination In District Programs And Activities</i>
<i>1113</i>	<i>District And School Websites</i>
<i>1340</i>	<i>Access To District Records</i>
<i>3000</i>	<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 shall advertise for any of the following: (Public Contract Code 20111)

1. A public contract that involves an expenditure of \$15,000 or more, including a contract for construction, reconstruction, erection, alteration, renovation, improvement, painting, repainting, demolition, or repair work involving a district owned, leased, or operated facility
2. A contract that exceeds the amount specified in law, as annually adjusted by the Superintendent of Public Instruction, for any of the following:
 - a. The purchase of equipment, materials, or supplies to be furnished, sold, or leased to the district
 - b. Services, not including construction services or special services and advice in accounting, financial, legal, or administrative matters
 - c. Repairs that are not a public project, including maintenance

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

Instructions and Procedures for Advertised Bids

The Superintendent or designee shall call for bids by placing a notice at least once a week for two weeks in a local newspaper of general circulation published in the district, or if no such newspaper exists, then in some newspaper of general circulation that is circulated in the county. The Superintendent or designee also may post the notice on the district's 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)

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)
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 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 the right to present evidence of 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.

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.
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)

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

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 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.

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

Bids Not Required

Without advertising for bids and upon a determination that it is in the best interest of the district, the Board may "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. 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)

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)

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 saving comparison finding specified in Government Code 4217.12. (Government Code 4217.12)

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

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

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

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

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

Regulation
approved: September 17, 2012
revised: May 9, 2024

LAKESIDE UNION SCHOOL DISTRICT
Lakeside, California

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: 5/9/24

Agenda Item:

Board Policy and Administrative Regulation 3400: Management District Assets/Accounts

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

Adoption: 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:

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

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.

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.

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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.

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

Elec. Code 1090-1099
 Gov. Code 53995-53997
 Gov. Code 84308
 Gov. Code 87100-87500

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

Management Resources

Governmental Accounting Standards Board Pub. Implementation Guide No. 2019-3, Leases, August 2019
 Governmental Accounting Standards Board Pub. Implementation Guide No. 2023-1, Implementation Guidance Update – 2023, June 2023
 Governmental Accounting Standards Board Statement 96, Subscription-Based Information Technology Arrangements, May 2020
 Governmental Accounting Standards Board Statement 87, Leases, June 2017
 Governmental Accounting Standards 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

<u>Code</u>	<u>Description</u>
3000	<i>Concepts And Roles</i>
3100	<i>Budget</i>
3230	<i>Federal Grant Funds</i>
3300	<i>Expenditures And Purchases</i>
3312	<i>Contracts</i>
3314	<i>Payment For Goods And Services</i>
3314.2	<i>Revolving Funds</i>
3430	<i>Investing</i>
3440	<i>Inventories</i>
3451	<i>Petty Cash Funds</i>
3452	<i>Student Activity Funds</i>
3460	<i>Financial Reports And Accountability</i>
3470	<i>Debt Issuance And Management</i>
3511	<i>Energy And Water Management</i>
3530	<i>Risk Management/Insurance</i>
3551	<i>Food Service Operations/Cafeteria Fund</i>
4112.6	<i>Personnel Files</i>
4119.1	<i>Civil And Legal Rights</i>
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>

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.

Fraud 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
7. Disclosing investment activities engaged in or contemplated by the district
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, and discussing or disclosing the result of any investigation shall be made in consultation with legal counsel.

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

Governing Board Meeting Date: 5/9/24

Agenda Item:

Board Policy and Administrative Regulation 4112.2: Certification

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

Adoption: 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

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: Click here to enter text. |
| <input checked="" type="checkbox"/> Adoption | |

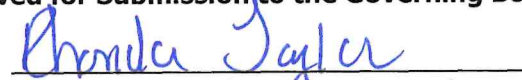
Originating Department/School: Superintendent's Office

Submitted/Recommended By:



Lisa DeRosier, Executive Assistant

Approved for Submission to the Governing Board:



Dr. Rhonda Taylor, Superintendent

Reviewed by Cabinet Member: _____

CERTIFICATION

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 to fill positions requiring certification qualifications possess the appropriate credential, permit or other certification document issued from the Commission on Teacher Credentialing (CTC) 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.

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

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)

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

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

Federal

20 USC 6312

34 CFR 200.61

Description

Title I local educational agency plans; notifications regarding teacher qualifications
Parent notification regarding teacher qualifications

Management Resources

Commission on Teacher Credentialing Publication
Commission on Teacher Credentialing Publication
Commission on Teacher Credentialing Publication

Commission on Teacher Credentialing Publication

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

<i>Commission on Teacher Credentialing Publication</i>	<i>Hiring Hierarchy in Education Code 44225.7, Coded Correspondence 13-01, January 30, 2013</i>
<i>Commission on Teacher Credentialing Publication</i>	<i>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</i>
<i>Commission on Teacher Credentialing Publication</i>	<i>California Standards for the Teaching Profession, 2009</i>
<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 (https://www.cde.ca.gov/pd/ps/nbptsprogram.asp)</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

<u>Code</u>	<u>Description</u>
0460	<i>Local Control And Accountability Plan</i>
1312.4	<i>Williams Uniform Complaint Procedures</i>
1312.4-E(1)	<i>Williams Uniform Complaint Procedures</i>
1312.4-E(2)	<i>Williams Uniform Complaint Procedures</i>
3580	<i>District Records</i>
4111	<i>Recruitment And Selection</i>
4112	<i>Appointment And Conditions Of Employment</i>
4112.21	<i>Interns</i>
4112.22	<i>Staff Teaching English Learners</i>
4112.5	<i>Criminal Record Check</i>
4112.5-E (1)	<i>Criminal Record Check</i>
4112.6	<i>Personnel Files</i>
4113	<i>Assignment</i>
4114	<i>Transfers</i>
4117.14	<i>Postretirement Employment</i>
4117.3	<i>Personnel Reduction</i>
4119.21	<i>Professional Standards</i>
4119.21-E (1)	<i>Professional Standards</i>
4121	<i>Temporary/Substitute Personnel</i>
4121	<i>Temporary/Substitute Personnel</i>
4131.1	<i>Teacher Support And Guidance</i>

4161.1	<i>Personal Illness/Injury Leave</i>
4161.11	<i>Industrial Accident/Illness Leave</i>
4161.3	<i>Professional Leaves</i>
4161.8	<i>Family Care And Medical Leave</i>
4211	<i>Recruitment And Selection</i>
4212.5	<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>
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 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)

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.

Basic Skills Proficiency

The district shall not initially hire a person requiring certification, on a permanent, temporary, or substitute basis, unless that person has demonstrated basic skills proficiency in reading, writing, and mathematics or is specifically exempted from the requirement by law. (Education Code 44252, 44252.6, 44830)

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)
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)

Short-Term Staff Permit

The district may request that the CTC issue a short-term staff permit (STSP) to an applicant whenever there is a need to immediately fill a classroom based on unforeseen circumstances, including, but not limited to: (5 CCR 80021)

1. Enrollment adjustments requiring the addition of another teacher
2. Inability of the teacher of record to finish the school year due to approved leave or illness
3. The applicant's need for additional time to complete preservice requirements for enrollment into an approved 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

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 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 of all of the following: (5 CCR 80021.1, 80026.5)

1. A diligent search has been conducted for a suitable credentialed teacher or suitable qualified intern as evidenced by documentation of the search.
2. Orientation, guidance, and assistance 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

3. The district 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 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 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)

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

Substitute Teaching Permits

The district may employ a person 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 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)

Regulation
approved: September 17, 2012
revised: May 9, 2024

LAKESIDE UNION SCHOOL DISTRICT
Lakeside, California

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: 5/9/24

Agenda Item:

Board Policy 4154/4254/4354: Health and Welfare Benefits

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

Adoption: Clarifying minor changes.

Fiscal Impact (Cost):

N/A

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"/> Review <small>Click here to enter text.</small> |
| <input checked="" type="checkbox"/> Adoption | <input type="checkbox"/> Explanation: <small>Click here to enter text.</small> |
-

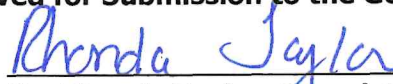
Originating Department/School: Superintendent's Office

Submitted/Recommended By:



Lisa DeRosier, Executive Assistant

Approved for Submission to the Governing Board:



Dr. Rhonda Taylor, Superintendent

Reviewed by Cabinet Member: _____

Personnel

BP 4154

4254

HEALTH AND WELFARE BENEFITS

4354

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.

For purposes of granting benefits, a registered domestic partner and 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)

The District shall provide health benefits only to retiring certificated and classified management, administrative, supervisory, and confidential 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.

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

Civ. Code 56.10-56.16

Civ. Code 56.20-56.245

Ed. Code 17566

Ed. Code 35208

Ed. Code 35214

Ed. Code 44041-44042

Ed. Code 44986

Ed. Code 45136

Ed. Code 7000-7008

Fam. Code 297-297.5

Fam. Code 300

Gov. Code 12940

Gov. Code 22750-22944

Gov. Code 53200-53210

H&S Code 1366.20-1366.29

H&S Code 1367.08

H&S Code 1373

H&S Code 1373.621

H&S Code 1374.58

Ins. Code 10116.5

Ins. Code 10128.50-10128.59

Ins. Code 10277-10278

Ins. Code 10604.5

Ins. Code 12670-12692.5

Lab. Code 2800.2

Lab. Code 4856

Unemp. Ins. Code 2613

Federal

1 USC 7

26 CFR 1.105-11

26 CFR 54.4980B-1-54.4980B-10

26 CFR 54.4980H-1-54.4980H-6

26 USC 105

26 USC 4980B

26 USC 4980H

26 USC 5000A

26 USC 6056

29 USC 1161-1168

42 USC 1395-1395g

42 USC 300gg-16

42 USC 300gg-300gg95

45 CFR 164.500-164.534

Description

Disclosure of information by medical providers

Use and disclosure of medical information by employers

Self-insurance fund

Liability insurance

Liability insurance (self-insurance or a combination of self-insurance and insurance through an insurance company)

Payroll deductions for collection of premiums

Leave of absence; state disability benefits

Benefits for classified employees

Health and welfare benefits; retired certificated employees

Rights, protections, benefits under the law; registered domestic partners

Definition of marriage

Unlawful discriminatory employment practices

Public Employees' Medical and Hospital Care Act

Group insurance

Cal-COBRA program; health insurance

Disclosure of fees and commissions paid related to health care service plan

Health services plan; coverage for dependent children

Continuation coverage; age 60 or older after five years with district

Coverage for registered domestic partners; health service plans and health insurers

Continuation coverage; age 60 or older after five years with district

Cal-COBRA program; disability insurance

Group and individual health insurance; coverage for dependent children

Annual disclosure of fees and commissions paid

Conversion coverage

Notification of availability of continuation health coverage

Health benefits for spouse of peace officer killed in performance of duties

Disability insurance; notice of rights and benefits

Description

Definition of marriage and spouse

Self-insured medical reimbursement plan

COBRA continuation coverage

Patient Protection and Affordable Care Act

Self-insured medical reimbursement plan; definition of highly compensated individual

COBRA continuation coverage

Penalty for noncompliance with employer-provided health care requirements

Minimum essential coverage

Report of health coverage provided to employees

COBRA continuation coverage

Medicare benefits

Group health plan; nondiscrimination in favor of highly compensated individuals

Patient Protection and Affordable Care Act

Privacy of individually identifiable health information

Management Resources

CSBA Publication

Internal Revenue Service Notification

U.S. Department of Treasury Publication

Website

Website

Website

Website

Website

Website

Cross References

Code

1340

3100

3460

3530

4030

4112.6

4112.9

4112.9-E(1)

4113.5

4117.11

4118

4121

4140

4141

4141.6

4151

4157.1

4161

4161.1

4161.11

4161.8

4212.6

4212.9

4212.9-E(1)

4213.5

4217.11

4218

4240

4241

4241.6

4251

4257.1

4261

4261

4261.1

4261.11

4261.8

4300

4312.6

4312.9

4312.9-E(1)

4313.5

Description

Health Policy: Implications of Covered California for School Boards, Districts and Personnel, Governance Brief, January 2013

2011-1 Affordable Care Act Nondiscrimination Provisions Applicable to Insured Group Health Plans

Fact Sheet: Final Regulations Implementing Employer Shared Responsibility Under the Affordable Care Act (ACA) for 2015

CSBA District and County Office of Education Legal Services

U.S. Department of Health and Human Services, Centers for Medicare and Medicaid Services

California Employment Development Department

Internal Revenue Service

U.S. Department of Labor

CSBA

Description

Access To District Records

Budget

Financial Reports And Accountability

Risk Management/Insurance

Nondiscrimination In Employment

Personnel Files

Employee Notifications

Employee Notifications

Working Remotely

Preretirement Part-Time Employment

Dismissal/Suspension/Disciplinary Action

Temporary/Substitute Personnel

Bargaining Units

Collective Bargaining Agreement

Concerted Action/Work Stoppage

Employee Compensation

Work-Related Injuries

Leaves

Personal Illness/Injury Leave

Industrial Accident/Illness Leave

Family Care And Medical Leave

Personnel Files

Employee Notifications

Employee Notifications

Working Remotely

Preretirement Part-Time Employment

Dismissal/Suspension/Disciplinary Action

Bargaining Units

Collective Bargaining Agreement

Concerted Action/Work Stoppage

Employee Compensation

Work-Related Injuries

Leaves

Leaves

Personal Illness/Injury Leave

Industrial Accident/Illness Leave

Family Care And Medical Leave

Administrative And Supervisory Personnel

Personnel Files

Employee Notifications

Employee Notifications

Working Remotely

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>

Personnel

AR 4154

4254

HEALTH AND WELFARE BENEFITS

4354

Affordability of Health Coverage

The Superintendent or designee shall seek written assurance from the district's health insurance carrier(s) that the health plan offered to full-time district employees and their dependents meets all requirements of the federal Patient Protection and Affordable Care Act. (42 USC 300gg-300gg95; 26 USC 4980H; 26 CFR 54.4980H-1-54.4980H-6)

The Superintendent or designee also shall ensure that each employee's contribution to the employee-only health coverage does not exceed 9.5 percent of his/her modified household income, as defined in 26 USC 5000A. The Superintendent or designee shall calculate the affordability of the coverage using one or more of the following methods in a uniform and consistent basis for all employees within the same category: (26 USC 4980H; 26 CFR 54.4980H-4-54.4980H-5)

1. The district shall ensure that the lowest cost employee-only coverage does not exceed 9.5 percent of wages paid to the employee by the district for the calendar year as reported on the employee's W-2 tax form. For an employee not offered coverage for an entire calendar year, the wages shall be adjusted to reflect the period for which coverage was offered.
2. The district shall ensure that the employee's required monthly contribution for the lowest cost employee-only coverage does not exceed 9.5 percent of an amount equal to 130 hours multiplied by the employee's hourly rate of pay on the first day of the plan year or his/her lowest hourly pay during the calendar month, whichever is lower.
3. The district shall ensure that the employee's contribution does not exceed 9.5 percent of a monthly amount determined as the federal poverty line for a single individual for the applicable calendar year, divided by 12.

Retired Certificated Employees

Any former certificated employee who retired from the district under any public retirement system and his/her spouse/domestic partner shall be permitted to enroll in the health and welfare and/or dental care benefit plan currently provided for certificated employees. The plan also shall be available to any surviving spouse/domestic partner of a former certificated employee who either retired from the district under any public retirement system or was, at the time of death, employed by the district and a member of the State Teachers' Retirement System. (Education Code 7000)

A retired certificated employee or surviving spouse/domestic partner shall be allowed to enroll in the coverage within 30 days of losing active employee coverage. If he/she does not enroll during this initial enrollment period, he/she may be denied further opportunity to do so. (Education Code 7000)

COBRA/Cal-COBRA Continuation Coverage

Covered district employees and their qualified beneficiaries shall be offered the opportunity to continue health and disability insurance coverage when they otherwise would lose coverage due to one of the following qualifying events: (Health and Safety Code 1366.21, 1366.23, 1373; Insurance Code 10128.51, 10128.53, 10277; 26 USC 4980B; 26 CFR 54.4980B-4)

1. Death of the covered employee
2. Termination or reduction in hours of the covered employee's employment, other than termination by reason of the employee's gross misconduct
3. Divorce or legal separation of the covered employee
4. The covered employee becoming entitled to Medicare benefits
5. A dependent child ceasing to be a dependent child of the covered employee

Continuation health coverage shall be the same as provided to similarly situated individuals under the group benefit plan. (Health and Safety Code 1366.23; Insurance Code 10128.53; 26 USC 4980B)

The Superintendent or designee shall notify the health care service plan administrator of a qualifying event listed in item #1, 2, or 4 above, within 30 days of the event. A covered employee or qualified beneficiary shall notify the service plan administrator of a qualifying event listed in item #3 or 5 above within 60 days of the event or of the date that the beneficiary would lose coverage, whichever is later. (26 USC 4980B; 29 USC 1163, 1166; 26 CFR 54.4980B-6)

Continuation coverage shall be terminated in accordance with the district's insurance plan and federal and state law. (26 USC 4980B; 26 CFR 54.4980B-6; Health and Safety Code 1373.621; Insurance Code 10116.5)

Disability Insurance

The Superintendent or designee shall give notice of disability insurance rights and benefits to each new employee and each employee leaving work due to pregnancy, nonoccupational illness or injury, the need to provide care for any sick or injured family member, or the need to bond with a minor child within the first year of the child's birth or placement in connection with foster care or adoption. (Unemployment Insurance Code 2613)

When disabled by an injury sustained from a violent act while performing duties within the scope of employment and performing creditable employment, a certificated or classified employee may continue in the district health and dental care plans upon meeting criteria specified by law. The employee shall pay all employer and employee premiums and related administrative costs. (Education Code 7008)

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: May 9th, 2024

Agenda Item:

Enrollment Report Month 8 (3/4/24 – 3/29/2024)

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:

- | | |
|--|--|
| <input checked="" type="checkbox"/> Informational | <input 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 | |


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 8					3/4/2024 - 3/29/24		DATE: 4/30/2024
												M8	M8	
												23/24	22/23	
SCHOOL	TK	K	1	2	3	4	5	6	7	8	TOTAL	TOTAL	VARIANCE	
LAKESIDE FARMS	67	93	101	104	101	86	97				649	644	5	
LAKEVIEW	39	92	95	124	98	109	95				652	657	-5	
LEMON CREST	22	64	71	67	67	72	76				439	500	-61	
LINDO PARK	24	55	60	58	76	73	81				427	457	-30	
RIVERVIEW				132	124	130	111				497	521	-24	
WINTER GARDENS	124	111	45								280	305	-25	
LAKESIDE MIDDLE								250	221	197	668	672	-4	
TIERRA DEL SOL								269	224	265	758	717	41	
DREAM ACADEMY	3	10	9	9	5	13	11	8	10	9	87	54	33	
NPS/RTC		1	0	1	0	1	2	1	1	0	7	5	2	
DISTRICT TOTAL	279	426	381	495	471	484	473	528	456	471	4,464	4,532	-68	
YEAR OVER YEAR COMPARISON														
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	4,464					
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	-		
BARONA INDIAN CHARTER SCHOOL		GRADE	TK/K	1	2	3	4	5	6	7	8	TOTAL		
			16	7	9	11	13	6	10	9	4	85		
RIVER VALLEY CHARTER SCHOOL		GRADE	7	8	9	10	11	12				TOTAL		
			25	40	38	40	45	41				229		

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: May 9, 2024

Agenda Item:

Quarterly Investment Reports, San Diego County Treasury Investment Pool as of quarter ended on March 31, 2024.

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

Reports for disclosure of district investments pursuant to Government Code Section 53646. Exhibit A reports the quarterly cash balance of all district funds invested in the San Diego County Treasury Investment Pool.

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 checked="" 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: Click here to enter text. |
| <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 _____

Exhibit A

District Superintendent and
Governing Board of the
Lakeside Union School District

**Quarterly Report of Chief Financial Officer
Regarding Disclosure of District Investments**

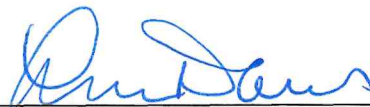
Pursuant to Government Code Section 53646, you are hereby notified that as of the quarter ended March 31, 2024 the funds of the Lakeside Union School District were invested in the San Diego County Investment Pool Balances by fund shown below:

<i>San Diego County Treasury Investment Pool</i>		<i>\$34,334,106.21</i>
<i>0100</i>	General Fund	\$ 21,120,123.93
<i>0800</i>	ASB	\$ 51,536.64
<i>1200</i>	Child Development	\$ 4,740,734.49
<i>1300</i>	Child Nutrition	\$ 4,023,476.80
<i>1500</i>	Pupil Transportation-Equip.	\$ 10,551.87
<i>1742</i>	Special Reserve Other Than Capital Outlay	\$ 257.06
<i>2139</i>	Building Fund (Bond)	\$ 234,408.81
<i>2519</i>	Capital Facilities/Developer Fees	\$ 1,775,601.41
<i>4000</i>	Special Reserves/Capital Projects	\$ 2,377,415.20

Annualized Interest Rate as of 3/31/24 is 3.784%

All funds received or collected by the Lakeside Union School District are deposited into the County Treasury with the exception of those allowed by Education Code 41002.5 Such exceptions may be deposited in financial institutions whose accounts are federally insured. Examples of such funds for LUSD are ASB funds, cafeteria funds and ESS funds.

I, Lisa Davis, Assistant Superintendent of the Lakeside Union School District, hereby certify that the information contained in this report, including the attachments, is accurate and correct to the best of my knowledge.



Lisa Davis
Assistant Superintendent

April 30, 2024

Date

**San Diego County Office of Education
SD County Pool Interest Rate
2023-24 Fiscal Year**

Quarter Ending	Interest Rate	
	Quarterly	Annualized
September 30, 2023	0.8726082%	3.490%
December 31, 2023	0.9730028%	3.892%
March 31, 2024	0.9926369%	3.971%
June 30, 2024		0.000%
Annualized Rate		3.784%

Quarterly interest factor x4 = annualized interest rate

Add quarterly interest rates divided by 4 = annualized rate for the year

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: 5/9/2024

Agenda Item:

Administrative Regulation and Exhibit 1312.4; Williams Uniform Complaint Procedures

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

First Reading:

Regulation updated to reflect NEW LAW (AB 1078, 2023) which (1) requires the California Department of Education (CDE) to develop, by July 1, 2025, guidance and public educational materials to ensure that all Californians can access information about educational laws and policies that safeguard the right to an accurate and inclusive curriculum, (2) provides that complaints related to instructional materials alleging that more than one student does not have sufficient textbooks or instructional materials as the result of an act by the Governing Board, or the Board's failure to remedy the deficiency, may be filed with the Superintendent of Public Instruction (SPI) directly, and the SPI may directly intervene without waiting for an investigation, and, (3) requires CDE, upon a finding that a district has not provided sufficient textbooks or instructional materials, to take all remedial actions required by law, including purchasing textbooks and instructional materials and assessing a financial penalty against the district's local control funding formula. Regulation also updated to reflect NEW LAW (SB 114, 2023) which requires that the Williams uniform complaint procedure be used to address a complaint related to teacher misassignment that claims that a teacher who lacks credentials or training to teach English learners is assigned to teach a class with one or more English learners in the class, (formerly with more than 20 percent English learners in the class), and NEW LAW (SB 760, 2023) which authorizes districts to temporarily close a restroom for a documented student safety concern, an immediate threat to student safety, or to repair the facility.

Exhibit updated to reference NEW LAW (SB 760, 2023) which authorizes districts to temporarily close a restroom for a documented student safety concern, an immediate threat to student safety, or to repair the facility, and NEW LAW (SB 114, 2023) which requires that the Williams uniform complaint procedure be used to address a complaint related to teacher misassignment that claims that a teacher who lacks credentials or training to teach English learners is assigned to teach a class with one or more English learners in the class, (formerly with more than 20 percent English learners in the class). Exhibit(2) 1312.4 - Williams Uniform Complaint Procedures Exhibit updated to reflect NEW LAW (SB 114, 2023) which requires that the Williams uniform complaint procedure be used to address a complaint related to teacher misassignment that claims that a teacher who lacks credentials or training to teach English learners is assigned to teach a class with one or more English learners in the class, (formerly with more than 20 percent English learners in the class), and NEW LAW (SB 760, 2023) which authorizes districts to temporarily close a restroom for a documented student safety concern, an immediate threat to student safety, or to repair the facility. Exhibit also updated to reflect NEW LAW (AB 1078, 2023) which provides that complaints related to instructional materials alleging that more than one student does not have sufficient textbooks or instructional materials as the result of an act by the Governing Board, or the Board's failure to remedy the deficiency, may be filed with the Superintendent of Public Instruction directly

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> |
-

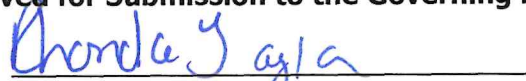
Originating Department/School: Superintendent's Office

Submitted/Recommended By:



Lisa DeRosier, Executive Assistant

Approved for Submission to the Governing Board:



Dr. Rhonda Taylor, Superintendent

Reviewed by Cabinet Member: _____

WILLIAMS UNIFORM COMPLAINT PROCEDURES

Types of Complaints

The district shall use the procedures described in this administrative regulation only to investigate and resolve the following:

1. Complaints regarding the insufficiency of textbooks and instructional materials including any complaint alleging that: (Education Code 35186; 5 CCR 4681)
 - a. A student, including an English learner, does not have standards-aligned textbooks or instructional materials or state- or district-adopted textbooks or other required instructional materials to use in class.
 - b. A student does not have access to textbooks or instructional materials to use at home or after school. This does not require two sets of textbooks or instructional materials for each student.
 - c. Textbooks or instructional materials are in poor or unusable condition, have missing pages, or are unreadable due to damage.
 - d. A student was provided photocopied sheets from only a portion of a textbook or instructional materials to address a shortage of textbooks or instructional materials.
2. Complaints regarding teacher vacancy or misassignment, including any complaint alleging that: (Education Code 35186; 5 CCR 4682)
 - a. A semester begins and a teacher vacancy exists.
 - b. A teacher who lacks credentials or training to teach English learners is assigned to teach a class with more than 20 percent English learner pupils in the class.
 - c. A teacher is assigned to teach a class for which the teacher lacks subject matter competency.

Teacher vacancy means a position to which a single designated certificated employee has not been assigned at the beginning of the year for an entire year or, if the position is for a one-semester course, a position to which a single designated certificated employee has not been assigned at the beginning of the semester for an entire semester. (Education Code 35186; 5 CCR 4600)

Beginning of the year or semester means the time period from the first day pupils attend classes for a year-long course or semester-long course though not later than 20 business days afterwards.

Misassignment means the placement of a certificated employee in a teaching or services position for which the employee does not hold a legally recognized certificate or credential or the placement of a certificated employee in a teaching or services position that the employee is not otherwise authorized by statute to hold. (Education Code 35186; 5 CCR 4600)

3. Complaints regarding the condition of school facilities, including any complaint alleging that: (Education Code 35186; 5 CCR4683)
 - a. A condition poses an emergency or urgent threat to the health or safety of pupils or staff.

Emergency or urgent threat means structures or systems that are in a condition that poses a threat to the health and safety of pupils or staff while at school, including, but not limited to, gas leaks; nonfunctioning heating, ventilation, fire sprinklers, or air-conditioning systems; electrical power failure; major sewer line stoppage; major pest or vermin infestation; broken windows or exterior doors or gates that will not lock and that pose a security risk; abatement of hazardous materials previously undiscovered that pose an immediate threat to students or staff; structural damage creating a hazardous or uninhabitable condition; or any other condition deemed appropriate. (Education Code 17592.72)

- b. A school restroom has not been cleaned, maintained, or kept open in accordance with Education Code 35292.5.

Clean or maintained school restroom means a school restroom has been cleaned or maintained regularly, is fully operational, or has been stocked at all times with toilet paper, soap, or paper towels ~~or~~ **and** functional hand dryers. (Education Code 35292.5)

Open restroom means the school has kept all restrooms open during school hours when pupils are not in classes and has kept a sufficient number of restrooms open during school hours when pupils are in classes. This does not apply when the temporary closing of the restroom is necessary for **a documented student safety concern, an immediate threat to student safety**, or to ~~make~~ repairs **the facility**. (Education Code 35292.5)

In any school serving any of grades 6-12, a complaint may be filed alleging noncompliance with the requirement of Education Code 35292.6 to, at all times, stock and make available and accessible free of cost, an adequate supply of menstrual products in every women's and all-gender restroom and in at least one men's restroom. (Education Code 35292.6)

Forms and Notices

The Superintendent or designee shall ensure a Williams complaint form is available at each school. However, complainants need not use the district's complaint form in order to file a complaint. (Education Code 35186; 5 CCR 4680)

The Superintendent or designee shall ensure that the district's complaint form specifies the location for filing a complaint and contains a space to indicate whether the complainant desires a response to the complaint. A complainant may add as much text to explain the complaint as desired. (Education Code 35186; 5 CCR 4680)

The Superintendent or designee shall post in each classroom in each school a notice containing the components specified in Education Code 35186. (Education Code 35186)

Filing of Complaint

A complaint alleging any condition(s) specified in the section "Types of Complaints" above shall be filed with the principal or designee at the school in which the complaint arises. A complaint about problems beyond the authority of the principal shall be forwarded to the Superintendent or designee in a timely manner, but not to exceed 10 working days. Complaints may be filed anonymously. (Education Code 35186; 5 CCR 4680)

A complaint alleging that more than one student does not have sufficient textbooks or instructional materials as the result of an act by the Board, or the Board's failure to remedy the deficiency, may be filed with the Superintendent of Public Instruction (SPI) directly in addition to or in lieu of being filed with the district. Any such complaint shall identify the basis and provide evidence to support its filing directly with the SPI. (Education Code 35186)

Superintendent or designee may initiate an investigation in accordance with this administrative regulation, as described below, if there is sufficient evidence to do so.

Investigation and Response

The principal or a designee of the Superintendent shall make all reasonable efforts to investigate any problem within the principal's or designee's authority. (Education Code 8235.5, 35186; 5 CCR 4685)

The principal or Superintendent's designee shall remedy a valid complaint within a reasonable time period not to exceed 30 working days from the date the complaint was received. (Education Code 35186; 5 CCR 4685)

If the complainant has indicated on the complaint form a desire to receive a response to the complaint, the principal or Superintendent's designee shall send written resolution of the complaint to the mailing address of the complainant as indicated on the complaint within 45 working days of the initial filing of the complaint. If the principal makes this report, the information shall be reported at the same time to the Superintendent or designee. (Education Code 35186; 5 CCR 4680, 4685)

When Education Code 48985 is applicable and the complainant has requested a response, the response shall be written in English and in the primary language in which the complaint was filed. (Education Code 35186)

If a complainant is not satisfied with the resolution of a complaint, the complainant has the right to describe the complaint to the Governing Board at a regularly scheduled meeting. (Education Code 35186; 5 CCR 4686)

For any complaint concerning a facilities condition that poses an emergency or urgent threat to the health or safety of pupils or staff as described in Item #3a in the section "Types of Complaints" above, a complainant who is not satisfied with the resolution proffered by the principal or Superintendent or designee may file an appeal to the Superintendent of Public Instruction within 15 days of receiving the district's response. The complainant shall comply with the appeal requirements specified in 5 CCR 4632. (Education Code 35186; 5 CCR 4687)

All complaints and written responses shall be public records. (Education Code 35186; 5 CCR 4686)

Reports

On a quarterly basis, The Superintendent or designee shall report to the Board at a regularly scheduled public Board meeting and to the County Superintendent of Schools summarized data on the nature and resolution of all complaints. The report shall include the number of complaints by general subject area with the number of resolved and unresolved complaints. (Education Code 35186; 5 CCR 4686)

Policy Reference Disclaimer:

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

State

5 CCR 4600-4670

5 CCR 4600-4687

5 CCR 4690-4694

Ed. Code 1240

Ed. Code 17592.72

Ed. Code 200-262.4

Ed. Code 234.1

Ed. Code 33126

Ed. Code 35186

Ed. Code 35292.5-35292.6

Ed. Code 48907

Ed. Code 48950

Ed. Code 48985

Ed. Code 51501

Ed. Code 60010

Ed. Code 60040-60052

Ed. Code 60119

Ed. Code 60150

Federal

20 USC 6314

Description

Uniform complaint procedures

Uniform complaint procedures and Williams complaints

Health and safety complaints in license-exempt preschool programs

County superintendent of schools; duties

Urgent or emergency repairs; School Facility Emergency Repair Account

Prohibition of discrimination

Student protections relating to discrimination, harassment, intimidation, and bullying

School accountability report card

Williams uniform complaint procedures

Restrooms; maintenance and cleanliness

Exercise of free expression; time, place and manner rules and regulations

Speech and other communication

Notices to parents in language other than English

Nondiscriminatory subject matter

Instructional materials; definition

Requirements for instructional materials

Hearing on sufficiency of instructional materials

Penalty for insufficiency of textbooks and instructional materials

Description

Title I schoolwide program

Management Resources

Website

Website

Website

Website

Website

Website

Website

Cross References

Code

0410

0460

1100

1250

1312.2

1312.2-E(1)

1312.3

1312.3-E(1)

1312.3-E(2)

1340

3270

3514

3514.2

3517

3517-E(1)

3550

4112.2

4112.22

4113

4144

4244

4344

5145.3

5145.3

6142.92

6143

6161.1

6161.1-E(1)

6161.11

6161.2

6163.1

9000

9012

9200

9322

Description

California County Superintendents Educational Services Association

CSBA District and County Office of Education Legal Services

State Allocation Board, Office of Public School Construction

Department of Justice

U.S. Department of Education, Office for Civil Rights

CSBA

California Department of Education

Description

Nondiscrimination In District Programs And Activities

Local Control And Accountability Plan

Communication With The Public

Visitors/Outsiders

Complaints Concerning Instructional Materials

Complaints Concerning Instructional Materials

Uniform Complaint Procedures

Uniform Complaint Procedures

Uniform Complaint Procedures

Access To District Records

Sale And Disposal Of Books, Equipment And Supplies

Environmental Safety

Integrated Pest Management

Facilities Inspection

Facilities Inspection

Food Service/Child Nutrition Program

Certification

Staff Teaching English Learners

Assignment

Complaints

Complaints

Complaints

Nondiscrimination/Harassment

Nondiscrimination/Harassment

Mathematics Instruction

Courses Of Study

Selection And Evaluation Of Instructional Materials

Selection And Evaluation Of Instructional Materials

Supplementary Instructional Materials

Damaged Or Lost Instructional Materials

Library Media Centers

Role Of The Board

Board Member Electronic Communications

Limits Of Board Member Authority

Agenda/Meeting Materials

WILLIAMS UNIFORM COMPLAINT PROCEDURES

**NOTICE TO PARENTS/GUARDIANS, PUPILS, AND TEACHERS:
COMPLAINT RIGHTS**

Parents/Guardians, Pupils, and Teachers:

Pursuant to Education Code 35186, you are hereby notified that:

1. There should be sufficient textbooks and instructional materials. For there to be sufficient textbooks and instructional materials, each pupil, including English learners, must have a textbook or instructional material, or both, to use in class and to take home.
2. School facilities must be clean, safe, and maintained in good repair.
3. There should be no teacher vacancies or misassignments. There should be a teacher assigned to each class and not a series of substitutes or other temporary teachers. The teacher should have the proper credential to teach the class, including the certification required to teach English learners, if present.

Teacher vacancy means a position to which a single designated certificated employee has not been assigned at the beginning of the year for an entire year or, if the position is for a one-semester course, a position to which a single designated certificated employee has not been assigned at the beginning of a semester for an entire semester.

Misassignment means the placement of a certificated employee in a teaching or services position for which the employee does not hold a legally recognized certificate or credential or the placement of a certificated employee in a teaching or services position that the employee is not otherwise authorized by statute to hold.

4. If you choose to file a complaint alleging that any of the above conditions is not being met your complaint will be addressed through the district's Williams uniform complaint procedures as required by law. A complaint form may be obtained at the school office or district office, or downloaded from the school or district web site. You may also download a copy of the California Department of Education (CDE) complaint form from the following website: <http://www.cde.ca.gov/re/ep/ue> CDE's website, **when available**. However, a complaint need not be filed using either the district's complaint form or the complaint form from the ~~California Department of Education~~ CDE.

WILLIAMS UNIFORM COMPLAINT PROCEDURES

COMPLAINT FORM: WILLIAMS UNIFORM COMPLAINT PROCEDURES

Education Code 35186 creates a procedure for the filing of complaints concerning deficiencies related to instructional materials, conditions of facilities that are not maintained in a clean or safe manner or in good repair, teacher vacancy or misassignment. The complaint and response are public documents as provided by law. Complaints may be filed anonymously. However, if you wish to receive a response to your complaint, you must provide the contact information below.

Response requested? Yes No

Contact information:

Name: _____

Address: _____

Phone number: Day: _____ Evening: _____

E-mail address, if any: _____

Date problem was observed: _____

Location of the problem that is the subject of this complaint:

School name/address: _____

Course title/grade level and teacher name: _____

Room number/name of room/location of facility: _____

Only the following issues may be the subject of this complaint process. If you wish to complain about an issue not specified below, please use the appropriate district complaint procedure.

Specific issue(s) of the complaint: (Please check all that apply. A complaint may contain more than one allegation.)

1. Textbooks and instructional materials: (Education Code 35186; 5 CCR 4681)

- A student, including an English learner, does not have standards-aligned textbooks or instructional materials or state- or district-adopted textbooks or other required instructional materials to use in class.
- A student does not have access to textbooks or instructional materials to use at home or after school. This does not require two sets of textbooks or instructional materials for each pupil.
- Textbooks or instructional materials are in poor or unusable condition, have missing pages, or are unreadable due to damage.
- A student was provided photocopied sheets from only a portion of a textbook or instructional materials to address a shortage of textbooks or instructional materials.

Please be aware that you may file a complaint directly with the Superintendent of Public Instruction if you are alleging that more than one student does not have sufficient textbooks or instructional materials as the result of an act by the Governing Board, or the Board's failure to remedy the deficiency.

Please provide a signature below. If you wish to remain anonymous, a signature is not required. However, all complaints, even anonymous ones, should be dated.

(signature)

(date)

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: 5/9/2024

Agenda Item:

Board Policy and Administrative Regulation 1330: Use of School Facilities

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

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

Administrative Regulation 1330 – Use of School Facilities Regulation updated to encourage districts to create a facilities use application and agreement for the use of school facilities and grounds by any entity other than the district, add that anyone applying to use school facilities do so as specified in district procedures and in accordance with law, and reflect NEW LAW (AB 2028, 2022) which authorizes the Governing Board to allow district facilities to be used by local law enforcement, public agencies, nonprofit associations, or organizations for bicycle, scooter, electric bicycle, motorized bicycle, or motorized scooter safety instruction for district students.

Delete - Exhibit(1) 1330 – Use of School Facilities Exhibit deleted as unnecessary with relevant material included in administrative regulation 1330 – Use of School Facilities.

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"/> Explanation: Click here to enter text. |
| <input type="checkbox"/> Adoption | |

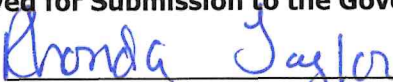
Originating Department/School: Superintendent's Office

Submitted/Recommended By:



Lisa DeRosier, Executive Assistant

Approved for Submission to the Governing Board:



Dr. Rhonda Taylor, Superintendent

Reviewed by Cabinet Member: _____

USE OF SCHOOL FACILITIES

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

*(ef. 1400—Relations Between Other Governmental Agencies and the Schools)
(ef. 6145.5—Student Organizations and Equal Access)*

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

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

1. Aid, encourage, and assist groups desiring to use school facilities for approved activities
2. Preserve order in school buildings and on school grounds and protect school facilities, **designating including the designation of** a person to supervise this task, if necessary

*(ef. 0450—Comprehensive School Safety Plan)
(ef. 3516—Emergencies and Disaster Preparedness Plan)*

3. Ensure that the use of school facilities or grounds is not inconsistent with their use for school purposes and does not interfere with the regular conduct of schoolwork

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

(ef. 6115—Ceremonies and Observances)

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

(ef. 1325—Advertising and Promotion)

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

(ef. 1330.1—Joint Use Agreements)

Fees

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

(cf. 9320—Meetings and Notices)

(No charge to school-related organizations)

The Board authorizes the use of school facilities or grounds without charge to school-related organizations whose activities are directly related to or for the benefit of district schools. All other groups requesting the use of school facilities under the Civic Center Act shall be charged an amount not to exceeding direct costs determined in accordance with 5 CCR 14037-14041.

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

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

Calculating Direct Costs

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

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

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

Expending Funds Collected as Capital Direct Costs

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

Use of School Facility as Polling Place

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

(cf. 6111—School Calendar)

When a school is used as a polling place, **or vote center,** the Superintendent or designee shall provide the elections official a site with an adequate amount of space that will allow the precinct board to perform its duties in a manner that will not impede, interfere, or interrupt the normal process of voting and shall make a telephone line for Internet access available for use by local elections officials if so requested. ~~He/she~~ **The Superintendent or designee** shall make a reasonable effort to ensure that the site is accessible to persons with disabilities. (Elections Code 12283)

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

(cf. 3515.2—Disruptions)

Legal Reference:

EDUCATION CODE

~~10900-10914.5—Community recreation programs~~

~~32282—School safety plan~~

~~37220—School holidays~~

~~38130-38138—Civic Center Act, use of school property for public purposes~~

BUSINESS AND PROFESSIONS CODE

~~25608—Alcoholic beverage on school premises~~

ELECTIONS CODE

~~12283—Polling places: schools~~

GOVERNMENT CODE

~~54950-54963—The Ralph M. Brown Act~~

MILITARY AND VETERANS CODE

~~1800—Definitions~~

CODE OF REGULATIONS, TITLE 5

~~14037-14042—Proportionate direct costs for use of school facilities and grounds~~

UNITED STATES CODE, TITLE 20

7905 Equal access to public school facilities

COURT DECISIONS

Good News Club v. Milford Central School, (2001) 533 U.S. 98

Lamb's Chapel v. Center Moriches Union Free School District, (1993) 508 U.S. 384

Cole v. Richardson, (1972) 405 U.S. 676

Connell v. Higgenbotham, (1971) 403 U.S. 207

ACLU v. Board of Education of Los Angeles, (1961) 55 Cal.2d 167

Ellis v. Board of Education, (1945) 27 Cal.2d 322

ATTORNEY GENERAL OPINIONS

82 Ops. Cal. Atty. Gen. 90 (1999)

79 Ops. Cal. Atty. Gen. 248 (1996)

Management Resources:

CSBA PUBLICATIONS

Maximizing Opportunities for Physical Activity Through Joint Use of Facilities, Policy Brief, February 2010

Building Healthy Communities: A School Leader's Guide to Collaboration and Community Engagement, 2009

WEB SITES

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

California Department of Education: <http://www.ede.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

5 CCR 14037-14042

Bus. Code 25608

Ed. Code 10900-10914.5

Ed. Code 32280-32289.5

Ed. Code 37220

Ed. Code 38130-38138

Ed. Code 51860

Elec. Code 12283

Gov. Code 54950-54963

M&V Code 1800

Description

Proportionate direct costs for use of school facilities and grounds

Alcohol on school property; use in connection with instruction

Community recreation programs

School safety plans

School holidays

Civic Center Act; use of school property for public purposes

Time and facilities for bicycle and scooter safety instruction

Polling places: schools

The Ralph M. Brown Act

Definitions

Federal

20 USC 7905

40 CFR 141.1-141.723

Management Resources

Attorney General Opinion

Attorney General Opinion

Court Decision

Court Decision

Court Decision

Court Decision

Court Decision

Court Decision

CSBA Publication

CSBA Publication

Website

Website

Website

Description

Equal access to public school facilities

Drinking water standards

Description

79 Ops. Cal. Atty. Gen. 248 (1996)

82 Ops. Cal. Atty. Gen. 90 (1999)

Ellis v. Board of Education, (1945) 27 Cal.2d 322

Good News Club v. Milford Central School, (2001) 533 U.S. 98

Lamb's Chapel v. Center Moriches Union Free School District, (1993)

508 U.S. 384

ACLU v. Board of Education of Los Angeles, (1961) 55 Cal.2d 167

Cole v. Richardson, (1972) 405 U.S. 676

Connell v. Higgenbotham, (1971) 403 U.S. 207

Building Healthy Communities: A School Leader's Guide to Collaboration and Community Engagement, 2009

Maximizing Opportunities for Physical Activity Through Joint Use of Facilities, Policy Brief, February 2010

CSBA District and County Office of Education Legal Services

California Department of Education

CSBA

Cross References

Code

0410
0450
0470
1000
1160
1230
1325
1330.1
1400
3280
3513.3
3513.4
3515.2
3515.21
3516
3530
4119.25
4219.25
4319.25
5148
5148.2
5148.3
6111
6115
6141.2
6145
6145.5
7160
9320

Description

Nondiscrimination In District Programs And Activities
Comprehensive Safety Plan
COVID-19 Mitigation Plan
Concepts And Roles
Political Processes
School-Connected Organizations
Advertising And Promotion
Joint Use Agreements
Relations Between Other Governmental Agencies And The Schools
Sale Or Lease Of District-Owned Real Property
Tobacco-Free Schools
Drug And Alcohol Free Schools
Disruptions
Unmanned Aircraft Systems (Drones)
Emergencies And Disaster Preparedness Plan
Risk Management/Insurance
Political Activities Of Employees
Political Activities Of Employees
Political Activities Of Employees
Child Care And Development
Before/After School Programs
Preschool/Early Childhood Education
School Calendar
Ceremonies And Observances
Recognition Of Religious Beliefs And Customs
Extracurricular And Cocurricular Activities
Student Organizations And Equal Access
Charter School Facilities
Meetings And Notices

USE OF SCHOOL FACILITIES

Application for Use of Facilities

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

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

Civic Center Use

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

1. Public, literary, scientific, recreational, educational, or public agency meetings
2. The discussion of matters of general or public interest
3. The conduct of religious services for temporary periods, on a one-time or renewable basis, by any church or religious organization
4. Child care programs to provide supervision and activities for children of preschool and elementary school age

~~(cf. 5148—Child Care and Development)
(cf. 5148.2—Before/After School Programs)
(cf. 5148.3—Preschool/Early Childhood Education)~~

5. The administration of examinations for the selection of personnel or the instruction of precinct board members by public agencies
6. Supervised recreational activities, including, but not limited to, sports league activities **for youth** that are arranged for and supervised by entities, including religious organizations or churches, and in which youth may participate regardless of religious belief or denomination
7. A community youth center
8. Mass care and welfare shelters during disasters or other emergencies affecting the public health and welfare

~~(cf. 0450—Comprehensive Safety Plan)~~
~~(cf. 3516—Emergencies and Disaster Preparedness Plan)~~

9. A ceremony, patriotic celebration, or related educational assembly conducted by a veterans' organization

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

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

- ~~11.~~ Other purposes deemed appropriate by the Governing Board

Restrictions

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

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

~~(cf. 3513.3—Tobacco-Free Schools)~~

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

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

Damage and Liability

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

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

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

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

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: 5/9/2024

Agenda Item:

Board Policy 4140/4240: Bargaining Units

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

First Reading: Policy updated to clarify use of "employee organization," "recognized employee organization," "exclusive representative," and "bargaining unit". Additionally, policy updated to clarify Public Employee Relations Board opinions regarding when a district may restrict the wearing of union buttons, insignia, or other pictorial or written messages by employees, when a district may limit an employee organization's ability to communicate with its members, and what constitutes "reasonable restrictions" by a district. In addition, policy updated to remove outdated material related to COVID-19, and reflect NEW LAW (AB 243, 2023) which extends the Safe at Home address confidentiality protection to victims of child abduction and members of their households. Policy also updated for clarity, precision, organization, and consistency.

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"/> Explanation: Click here to enter text. |
| <input type="checkbox"/> Adoption | |

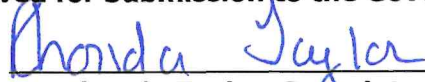
Originating Department/School: Superintendent's Office

Submitted/Recommended By:



Lisa DeRosier, Executive Assistant

Approved for Submission to the Governing Board:



Dr. Rhonda Taylor, Superintendent

Reviewed by Cabinet Member: _____

BARGAINING UNITS

The Governing Board recognizes the right of district employees to form a bargaining units, select an employee organization as the exclusive representative to represent the employees in the employee’s employment relationship with the district. The Board is committed to negotiating in good faith ~~with recognized employee organizations~~ **the exclusive representative** and respecting the rights of employees and employee organizations.

The district shall not dominate or interfere with the formation or administration of any employee organization or contribute financial or other support to it. (Government Code 3543.5)

Employees shall not be prohibited from wearing union buttons, insignia, or other pictorial or written messages that favor or oppose the formation of a bargaining unit or any matter that is the subject of negotiations.

Formation of Bargaining Units

Certificated and classified employees shall not be included in the same bargaining unit. (Government Code 3545)

A bargaining unit of **certificated or classified** supervisory employees may **only** be recognized if the a bargaining unit includes all **certificated or classified** supervisory employees, **respectively** and is not represented by the ~~an~~ **same** employee organization that represents district employees who are supervised by the supervisory employees. (Government Code 3545)

For this purpose, *supervisory employee* means any employee, regardless of job description, having the authority, in the interest of the district, to hire, transfer, suspend, layoff, recall, promote, discharge, assign, reward, or discipline other employees, or the responsibility to assign work to, direct, or adjust grievance of other employees, or effectively recommend that action when the exercise of that authority is not of a merely routine or clerical nature, but requires the use of independent judgment. (Government Code 3540.1)

Employees serving in management, senior management, or confidential positions shall not be represented by an exclusive representative. In the employment relationship with the district, ~~such~~ **employees who serve in a management, senior management, or confidential position** may represent themselves or be represented by an employee organization whose membership is composed entirely of employees designated as holding those positions. ~~At~~ **However, an** employee organization representing management, **senior management**, or confidential employees shall not be permitted to meet and negotiate with the district on behalf of the employees. (**Education Code 45100.5**; Government Code ~~3540.1~~, 3543.4)

Management employee means any employee ~~who has~~ **in a position having** significant responsibilities for formulating district policies or administering district programs, ~~and whose position is designated as a management position by the Board.~~ (Government Code 3540.1)

Confidential employee means any employee who is required to develop or present management positions with respect to employer-employee relations or whose duties normally require access to confidential information that is used to contribute significantly to the development of management positions. (Government Code 3540.1)

Membership

The district shall not deter or discourage employees or job applicants from becoming or remaining members of an employee organization, authorizing representation by an employee organization, or authorizing dues or fee deductions to an employee organization. In addition, the district shall not impose or threaten to impose reprisals on employees, discriminate or threaten to discriminate against employees, or otherwise interfere with, restrain, or coerce employees because of their membership or nonmembership in an employee organization. (Government Code 3543.5, 3550, **3551.5**)

The Superintendent or designee may communicate with district employees regarding their rights to join and/or support an officially recognized employee organization or to refrain from joining or supporting an officially recognized employee organization. Such communications shall be factual and accurate, and may not promise a benefit, threaten a reprisal, or in any way deter or discourage employees from joining an employee organization or paying dues.

However, before disseminating to multiple employees any mass communication concerning employees' ~~right to join or support an employee organization or to refrain from joining or supporting an employee organization~~ **rights under the law**, such as a written document or script for oral or recorded presentation or message, the Superintendent or designee shall meet and confer with the employees' exclusive representative regarding the content of the communication. If the district and exclusive representative do not come to agreement on the content of the mass communication, the Superintendent or designee may disseminate the district's mass communication provided that, at the same time, copies of the exclusive representative's communication, which shall be of reasonable length, are also distributed. (Government Code 3553)

Access to New Employee Orientations

The district shall permit employee organizations access to new employee orientation or onboarding process where newly hired employees are advised, whether in person, online, or through other means or mediums, of their employment status, rights, benefits, duties, responsibilities, or any other employment-related matters. The district shall provide employee organizations at least 10 days' notice in advance of an orientation except that a shorter notice may be provided if an unforeseeable, urgent need critical to the district's operation prevents the required 10 days' notice. (Government Code 3555.5, 3556)

Following a request to negotiate by either party, the structure, time, and manner of the access to new employee orientations shall be determined by mutual agreement of the district and the exclusive representative. If the district and exclusive representative fail to reach an agreement, matters related to access to the new employee orientation shall be subject to compulsory interest arbitration. The district and employee organization may mutually agree to submit any dispute to compulsory interest arbitration at any time. In addition, if any dispute arises during

negotiations and is not resolved within 45 days after the first meeting or within 60 days after the initial request to negotiate, whichever is earlier, either party may make a demand for compulsory interest arbitration. **The arbitrator selection process shall commence within 14 days of a party's demand for compulsory interest arbitration.** When any such dispute arises during the summer when the district's administrative office is closed, the timeline shall commence on the first day the administrative office reopens. The decision of the arbitrator shall be **issued within 10 days and shall be** final and binding on the parties. (Government Code 3556, 3557)

The date, time, and place of a new employee orientation shall not be disclosed to anyone other than employees, the exclusive representative, or a vendor that is contracted to provide a service for purposes of the orientation. (Government Code 3556)

Until June 30, 2025, in addition to above provisions regarding new employee orientations, the district shall ensure the following: (Government Code 3556)

1. When an in-person new employee orientation has not been conducted within 30 days of hiring any new employee who is working in person, the Superintendent or designee shall permit the exclusive representative to schedule an in-person meeting which newly hired employees shall have an opportunity to attend, at the employee's worksite and during employment hours. Each newly hired employee within the bargaining unit shall be provided at least 30 minutes of paid time to attend the meeting. ~~Upon the request of an exclusive representative scheduling~~ **during which the exclusive representative shall be permitted to communicate directly with the newly hired employees.**

Within seven days of an exclusive representative's request to schedule such an in-person meeting, the Superintendent or designee shall provide an appropriate on-site meeting space ~~within seven days of receiving the exclusive representative's request.~~

2. When, by reason of a state or local public health order limiting the size of gatherings, the district is prohibited from organizing a new employee orientation, an exclusive representative may schedule multiple meetings to ensure that newly hired employees **have an opportunity to attend without exceeding the maximum allowable number of people. If such an order prohibits all gatherings, the exclusive representative may schedule a meeting(s) once the order is lifted or modified to permit gatherings.**

Alternative access to these meetings shall be determined through mutual agreement between the district and the exclusive representative.

Access to Employee Contact Information

The Superintendent or designee shall provide an exclusive representative with the name, job title, department, work location, telephone numbers (work, home, and personal cell phone), personal email address(es) on file with the district, and home address of any newly hired employee ~~in the bargaining unit~~, within 30 days of hire or by the first pay period of the month following hire, unless the exclusive representative has agreed to a different interval for the provision of the information. In addition, the Superintendent or designee shall provide the exclusive representative the same information in regard to all employees in the bargaining unit

at least every 120 days, unless more frequent or detailed lists are required by agreement with the exclusive representative. (Government Code 3558, ~~6254.3~~, **7928.300**)

However, the Superintendent or designee shall not disclose: (Government Code 3558, ~~6207~~, ~~6254.3~~)

1. The home address and any phone numbers on file for employees performing law enforcement-related functions, ~~nor disclose the home address, home or~~
2. **The home address, home telephone or** personal cell phone number(s), or personal email address(es) of any employee who is a participant in the Safe at Home address confidentiality program pursuant to Government Code 6207 ~~or of any employee who provides a written request that the information not be disclosed to the exclusive representative. Following receipt of a written request, the district shall remove the~~
3. **The employee's home address, home telephone and** personal cell phone numbers, and personal email address **of an employee not performing law enforcement related functions if the employee has submitted a written request to keep such information private. In such instances, the Superintendent or designee shall also remove the employee's home address, and home telephone and personal cell phone numbers** from any mailing list maintained by the district unless the list is only used by the district to contact the employee.

Within 20 calendar days after an exclusive representative notifies the Superintendent or designee that a list of employees provided by the district is inaccurate or incomplete, the Superintendent or designee shall take steps to correct the list and provide a new list of employees to the exclusive representative. (Government Code 3558)

~~At least, at the beginning of each school year, To provide accurate information,~~ the Superintendent or designee shall review the list of **contact information** for district employees ~~to ensure that the list is complete and contains accurate information at the beginning of each school year, or more often as appropriate.~~

Communications with Employees

Employee organizations may have access at reasonable times to areas in which employees work and may use district facilities at reasonable times for the purpose of meetings. Subject to reasonable regulation, employee organizations may also use institutional bulletin boards, mailboxes, and other means of communication to communicate with employees. (Government Code 3543.1)

Access to district means of communication shall be limited in cases where such access would be disruptive to district operations.

Membership Dues or Other Payments to an Employee Organization

When drawing an order for the salary or wage payment of a bargaining unit employee of an employee organization, the district shall deduct any amount which has been requested by the employee in a revocable written authorization for the purpose of paying dues or other payments

for any service, program, or committee provided or sponsored by the employee organization. (Education Code 45060, 45168)

An employee organization that certifies that it has and will maintain individual employee authorizations shall handle and process employee written authorizations for payroll deductions. When an employee organization provides such a certification to the district, the district shall rely on information from the employee organization regarding the amounts of such payroll deductions and from which employees. The employee organization shall not be required to submit to the district a copy of the written authorization in order for the payroll deductions to be effective. However, when there is a dispute about the existence or terms of the written authorization, a copy of the employee's written authorization shall be submitted to the district. The employee organization shall indemnify the district for any employee claims regarding payroll deductions made by the district in reliance on notification from the employee organization. (Education Code 45060, 45168)

When an employee organization which has declined to certify that it will handle and process employee written authorizations makes a request for payroll deductions, the district shall request a copy of the employee's written authorization before making the payroll deductions. (Education Code 45060, 45168)

A written authorization shall remain in effect until expressly revoked in writing by the employee and pursuant to the terms of the written authorization. Employee requests to cancel or change authorizations for payroll deductions for employee organizations shall be directed to the employee organization rather than the district. The employee organization shall be responsible for processing these requests. The district shall rely on the information provided by the employee organization regarding whether deductions for an employee organization were properly canceled or changed. The employee organization shall be required to indemnify the district for any claims made by an employee for deductions made by the district in reliance on information from the employee organization. (Education Code 45060, 45168)

Legal Reference:

<u>State</u>	<u>Description</u>
8 CCR 33015-33490	<i>Recognition of exclusive representative; proceedings</i>
8 CCR 33700-33710	<i>Severance of established unit</i>
8 CCR 34020	<i>Petition to rescind organizational security arrangement</i>
8 CCR 34055	<i>Reinstatement of organizational security arrangement</i>
Ed. Code 45060-45061.5	<i>Deduction of fees from salary or wage payment,; certificated employees</i>
Ed. Code 45100.5	<i>Senior classified management positions</i>
Ed. Code 45104.5	<i>Abolishment of senior classified management positions</i>
Ed. Code 45108.5	<i>Definition of senior classified management employees</i>
Ed. Code 45108.7	<i>Waiver of provisions of 45108.5</i>
Ed. Code 45168	<i>Deduction of fees from salary or wage payment,; classified employees</i>
Ed. Code 45220-45320	<i>Merit system; classified employees</i>
Gov. Code 3540-3549.3	<i>Educational Employment Relations Act</i>
Gov. Code 3540.1	<i>Public employment definitions</i>
Gov. Code 3543.4	<i>Management position; representation</i>
Gov. Code 3545	<i>Appropriateness of unit; basis</i>
Gov. Code 3550-3552	<i>Prohibition on public employers deterring or discouraging union membership</i>
Gov. Code 3555-3559	<i>Public employee communication, information and orientation</i>
Gov. Code 53260-53264	<i>Employment contracts</i>

<i>Gov. Code 6205-6210</i>	<i>Confidentiality of addresses for victims of domestic violence, sexual assault or stalking</i>
<i>Gov. Code 6254.3</i>	<i>Disclosure of employee contact information to employee organization</i>
<i>Gov. Code 6503.5</i>	<i>Joint powers agencies</i>

Federal	Description
<i>8 CFR 33015-33490</i>	<i>Recognition of exclusive representative; proceedings</i>
<i>8 CFR 33700-33710</i>	<i>Severance of established unit</i>
<i>8 CFR 34020</i>	<i>Petition to rescind organizational security arrangement</i>
<i>8 CFR 34055</i>	<i>Reinstatement of organizational security arrangement</i>

Management Resources	Description
<i>Court Decision</i>	<i>County of Los Angeles v. Service Employees International Union, Local 721, (2013) 56 Cal. 4th 905</i>
<i>Court Decision</i>	<i>Friedrichs v. California Teachers Association, et al., (2016) 136 S.Ct. 1083</i>
<i>Court Decision</i>	<i>Janus v. American Federation of State, County and Municipal Employees, Council 31, (2018) 138 S.Ct. 2448</i>
<i>Public Employment Relations Board Ruling</i>	<i>East Whittier School District, (2004) PERB Dec. No. 1727</i>
<i>Public Employment Relations Board Ruling</i>	<i>City of Sacramento, (2019) PERB Dec. No. 2702m</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>
<i>Website</i>	<i>Association of California School Administrators</i>
<i>Website</i>	<i>CSBA</i>

Cross References

Code	Description
<i>0450</i>	<i>Comprehensive Safety Plan</i>
<i>0460</i>	<i>Local Control and Accountability Plan</i>
<i>1340</i>	<i>Access to District Records</i>
<i>1431</i>	<i>Waivers</i>
<i>4113</i>	<i>Assignment</i>
<i>4115</i>	<i>Evaluation/Supervision</i>
<i>4119.1</i>	<i>Civil and Legal Rights</i>
<i>4119.25</i>	<i>Political Activities of Employees</i>
<i>4121</i>	<i>Temporary/Substitute Personnel</i>
<i>4141</i>	<i>Collective Bargaining Agreement</i>
<i>4143</i>	<i>Negotiations/Consultation</i>
<i>4151</i>	<i>Employee Compensation</i>
<i>4154</i>	<i>Health and Welfare Benefits</i>
<i>4161.2</i>	<i>Personal Leaves</i>
<i>4219.1</i>	<i>Civil and Legal Rights</i>
<i>4219.25</i>	<i>Political Activities of Employees</i>
<i>4241</i>	<i>Collective Bargaining Agreement</i>
<i>4243</i>	<i>Negotiations/Consultation</i>
<i>4251</i>	<i>Employee Compensation</i>
<i>4254</i>	<i>Health and Welfare Benefits</i>
<i>4261.2</i>	<i>Personal Leaves</i>
<i>4300</i>	<i>Administrative and Supervisory Personnel</i>
<i>4301</i>	<i>Administrative Staff Organization</i>
<i>4312.1</i>	<i>Contracts</i>
<i>4315</i>	<i>Evaluation/Supervision</i>
<i>4319.1</i>	<i>Civil and Legal Rights</i>
<i>4319.25</i>	<i>Political Activities of Employees</i>
<i>4351</i>	<i>Employee Compensation</i>

4119.25	<i>Political Activities Of Employees</i>
4121	<i>Temporary/Substitute Personnel</i>
4141	<i>Collective Bargaining Agreement</i>
4143	<i>Negotiations/Consultation</i>
4151	<i>Employee Compensation</i>
4154	<i>Health And Welfare Benefits</i>
4158	<i>Employee Security</i>
4161.2	<i>Personal Leaves</i>
4219.1	<i>Civil And Legal Rights</i>
4219.25	<i>Political Activities Of Employees</i>
4241	<i>Collective Bargaining Agreement</i>
4243	<i>Negotiations/Consultation</i>
4251	<i>Employee Compensation</i>
4254	<i>Health And Welfare Benefits</i>
4261.2	<i>Personal Leaves</i>
4300	<i>Administrative And Supervisory Personnel</i>
4301	<i>Administrative Staff Organization</i>
4312.1	<i>Contracts</i>
4315	<i>Evaluation/Supervision</i>
4319.1	<i>Civil And Legal Rights</i>
4319.25	<i>Political Activities Of Employees</i>
4351	<i>Employee Compensation</i>
4354	<i>Health And Welfare Benefits</i>
4361.2	<i>Personal Leaves</i>
9000	<i>Role Of The Board</i>
9321	<i>Closed Session</i>

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: 5/9/2024

Agenda Item:

Board Policy 5116.2: Involuntary Student Transfers

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

First Reading: Policy updated to clarify that the policy only addresses involuntary transfers to other schools within the district, add that the determination of where to transfer a student who is the subject of involuntary transfer include a review of the programs to which the student may be involuntarily transferred, provide that the Superintendent or designee ensure that involuntary transfers are made in a nondiscriminatory manner, and reflect NEW CALIFORNIA DEPARTMENT OF EDUCATION GUIDANCE regarding legal requirements and recommended best practices governing voluntary and involuntary students transfers. Policy also updated to clarify requirements for an involuntary transfer of a student who has been convicted of a violent felony or a misdemeanor associated with possession of a firearm, an involuntary transfer to a continuation education program or class within the district, or an involuntary transfer to a community day school within the district. Additionally, policy updated to include information regarding notice and disclosure requirements.

Fiscal Impact (Cost):

N/A

Funding Source:

N/A

Recommended Action:

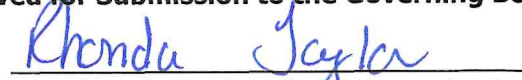
- | | |
|---|--|
| <input type="checkbox"/> Informational | <input type="checkbox"/> Denial |
| <input checked="" type="checkbox"/> Discussion | <input type="checkbox"/> Ratification |
| <input type="checkbox"/> Approval | <input type="checkbox"/> Explanation: Click here to enter text. |
| <input type="checkbox"/>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

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: _____

INVOLUNTARY STUDENT TRANSFERS

While the Governing Board desires to enroll students in the district school of their choice, it recognizes that circumstances sometimes necessitate the involuntary transfer of a student to another school or program in the district.

The Superintendent or designee shall develop procedures to facilitate the involuntary transfer of such students.

As applicable and as permitted by law, the Superintendent or designee shall review all educational options for which the student is eligible, the student's academic progress and needs, the enrollment capacity at the schools or programs to which the student could be involuntarily transferred, and the availability of support services and other resources.

The Superintendent or designee shall ensure that involuntary transfers are made in a non-discriminatory manner as specified in Board Policy 0410 - Nondiscrimination In District Programs And Activities.

Involuntary Transfer of a Student Convicted of Violent Felony or Misdemeanor Related to Possession of Firearms

A student may be transferred to another district school if the student is convicted of a violent felony, as defined in Penal Code 667.5(c), or a misdemeanor listed in Penal Code 29805 and is enrolled at the same school as the victim of the crime for which the student was convicted. However, before recommending such a transfer, the Superintendent, the principal, or other designee shall notify the student and the student's parent(s)/guardian(s) of the right to request a meeting with the principal or designee and shall attempt to resolve the conflict using restorative justice, counseling, or other such services. Participation of the victim in any conflict resolution program shall be voluntary, and the victim shall not be subjected to any disciplinary action for refusing to participate. (Education Code 48929)

If the attempt to resolve the conflict using restorative justice, counseling, or other such services is not successful or the victim elects not to participate, the principal or designee may submit to the Superintendent or designee a recommendation that the student should be involuntarily transferred. If the Superintendent or designee agrees with the recommendation, the Superintendent shall submit such recommendation to the Board for approval. The Superintendent's recommendation to the Board shall include the date by which the Superintendent or designee will review the involuntary transfer to determine whether to recommend to the Board that the student be permitted to transfer back to the student's original school.

The Board shall, in accordance with Board Bylaw 9321 - Closed Session, deliberate and vote on the recommendation, as well as any subsequent recommendation to permit the student to transfer back to the student's original school, in closed session to maintain the confidentiality of student information, unless a parent/guardian or adult student submits a written request that the matter be addressed in open session and doing so would not

violate the privacy rights of any other student. The Board's decisions in these instances shall be final.

Involuntary Transfers to a Continuation Education Program or Class within the District

The Superintendent or designee may involuntarily transfer a high school student to a continuation education program or class in the district if the student commits an act enumerated in Education Code 48900 or is habitually truant or irregular in school attendance and either of the following conditions are met: (Education Code 48432.5)

1. Other means to improve the student's behavior have failed
2. It is the first time the student committed an act enumerated in Section 48900 and the principal of the student's school determines that the student's presence causes a danger to person(s) or property or threatens to disrupt the instructional process.

Prior any final decision to involuntarily transfer a student, the Superintendent or designee shall notify the student and the student's parent(s)/guardian(s) of the right to request a hearing with the Superintendent or designee. If such a hearing is requested, the Superintendent or designee shall provide the specific facts and reasons for the proposed transfer, including all documents relied upon. At the hearing, the Superintendent or designee shall also allow the student or the student's parent(s)/guardian(s) to question any evidence or witnesses presented and present evidence, including witnesses, on the student's behalf. The student shall be allowed to bring one or more representatives to present at the hearing. (Education Code 48432.5)

If the Superintendent or designee decides to involuntarily transfer the student, the Superintendent or designee shall provide the decision to the student and the student's parent(s)/guardian(s) in writing. The decision shall include the facts and reasons for the decision and whether the decision is subject to periodic review and the periodic review procedure. (Education Code 48432.5)

The decision shall also include the date by which the student may transfer back to the student's original school, which shall be no longer than the end of the semester following the semester during which the acts leading directly to the involuntary transfer occurred. (Education Code 48432.5)

The final decision to involuntarily transfer the student may not involve a member of the staff of the school in which the student is enrolled at the time that the decision is made. (Education Code 48432.5)

Involuntary Transfers to a Community Day School within the District

If a student is expelled from school for any reason in accordance with Board Policy 5144.1 - Suspension And Expulsion/Due Process, is probation-referred pursuant to Welfare and Institutions Code 300 or 602, or is referred by a school attendance review board or another formal district process, the student may be transferred to a district community

day school as specified in Board Policy 6185 - Community Day School. (Education Code 48662)

Notice, Information, and Reports

The Superintendent or designee shall include notice of this policy in the annual notification to parents/guardians in accordance with Education Code 48980. (Education Code 48929)

Whenever 15 percent or more of the students enrolled in a district school speak a single primary language other than English, as determined from the California Department of Education census data collected pursuant to Education Code 52164, all notices and reports sent to the parent(s)/guardian(s) of any such student shall, in addition to being written in English, be written in the primary language, and may be responded to either in English or the primary language. (Education Code 48981, 48985)

Whenever an employee learns that a student's parent/guardian is unable to understand the district's printed notifications or reports for any reason, the employee shall inform the principal or designee, who shall work with the parent/guardian to establish other appropriate means of communication.

When a foster youth or American Indian Student, as defined in Welfare and Institutions Code 224.1, is being considered for an involuntary transfer, all notices, documents, and information that would be provided to parents/guardians shall be provided to the foster youth's educational rights holder, attorney, and county social worker and the American Indian Student's tribal social worker and, if applicable, county social worker. (Education Code 48853.5)

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>
Ed. Code 234.1	Monitoring, review, and assessment of antidiscrimination, antiharassment, anti-intimidation, and antibullying requirements
Ed. Code 35146	Closed sessions; student matters
Ed. Code 48430-48438	Continuation classes
Ed. Code 48432.5	Involuntary transfer to continuation school
Ed. Code 48660-48666	Community day schools
Ed. Code 48662	Involuntary transfer to community day school
Ed. Code 48853.5	Foster children; notice of educational rights; educational liaison; duties; continuation at school of origin; complaint of noncompliance
Ed. Code 48900	Grounds for suspension or expulsion
Ed. Code 48915	Expulsion
Ed. Code 48929	Transfer of student convicted of violent felony or misdemeanor
Ed. Code 48980	Parent/Guardian notifications
Ed. Code 48981	Timing and method of parent/guardian notifications
Ed. Code 48985	Notices to parents in language other than English
Ed. Code 52164	Census of pupils of limited English proficiency
Pen. Code 29805	Misdemeanors involving firearms
Pen. Code 667.5	Definition of violent felony
W&I Code 224.1	Indian child; definition
W&I Code 300	Minors subject to jurisdiction

Management Resources
 California Department of Education
 Memorandum
 Court Decision
 Website
 Website
 Website
 Cross References

Description
 Overuse and Improper Use of Voluntary and Involuntary Transfers,
 September 2023
 Nathan G. v. Clovis Unified School District (2014) 224 Cal.App.5th 1393
 CSBA District and County Office of Education Legal Services
 California Department of Education
 CSBA

<u>Code</u>	<u>Description</u>
0410	Nondiscrimination In District Programs And Activities
3515	Campus Security
3515	Campus Security
5113.1	Chronic Absence And Truancy
5113.1	Chronic Absence And Truancy
5116.1	Intradistrict Open Enrollment
5116.1	Intradistrict Open Enrollment
5131.2	Bullying
5131.2	Bullying
5138	Conflict Resolution/Peer Mediation
5144	Discipline
5144	Discipline
5144.1	Suspension And Expulsion/Due Process
5144.1	Suspension And Expulsion/Due Process
5144.2	Suspension And Expulsion/Due Process (Students With Disabilities)
5145.3	Nondiscrimination/Harassment
5145.3	Nondiscrimination/Harassment
5145.6	Parent/Guardian Notifications
5145.6	Parent/Guardian Notifications
6173.1	Education For Foster Youth
6173.1	Education For Foster Youth
6173.4	Education For American Indian Students
6184	Continuation Education
6184	Continuation Education
6185	Community Day School
6185	Community Day School

Policy 5116.2
 adopted:
 revised:

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: 5/9/2024

Agenda Item:

Board Policy 6162.5: Student Assessment

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

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

Fiscal Impact (Cost):

N/A

Funding Source:

N/A

Recommended Action:

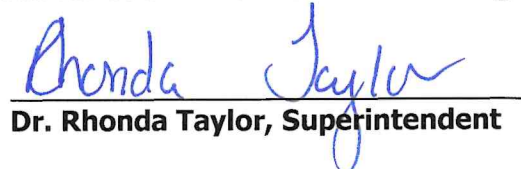
- | | |
|--|---|
| <input type="checkbox"/> Informational | <input type="checkbox"/> Denial |
| <input checked="" type="checkbox"/> Discussion | <input type="checkbox"/> Ratification |
| <input type="checkbox"/> Approval | <input type="checkbox"/> Explanation: Click here to enter text. |
| <input type="checkbox"/>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

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: _____



Instruction

BP 6162.5(a)

STUDENT ASSESSMENT

The Governing Board recognizes that student assessments are an important instructional and accountability tool. **To obtain the most accurate evaluation of student performance, the district shall use a variety of measures, including district, state, and/or national assessments.**

Assessment data shall be used to help determine individual students' progress, mastery of academic standards, appropriate placement in district programs, and/or eligibility for graduation. In addition, **summary data on student assessment results shall be used by the district to identify and review student achievement goals in the district's local control and accountability plan, evaluate district educational programs effectiveness and staff evaluations shall, as appropriate, be based in part on indicators of student achievement in order to identify needed improvements, and, as appropriate, evaluate staff performance.**

(ef. 0500—Accountability)
(ef. 4115—Evaluation/Supervision)
(ef. 5123—Promotion/Acceleration/Retention)
(ef. 6011—Academic Standards)
(ef. 6190—Evaluation of the Instructional Program)

~~To obtain the most accurate evaluation of student performance, the district shall use a variety of measures, including district, state, and/or national assessments. As appropriate, assessment results shall be disaggregated by student subgroup, classroom, grade level, or school site to allow for critical analysis of student needs.~~

(ef. 5121—Grades/Evaluation of Student Achievement)
(ef. 6142.7—Physical Education and Activity)
(ef. 6162.51—Standardized Testing and Reporting Program)
(ef. 6162.52—High School Exit Examination)

In selecting or developing **any** district assessment, the Superintendent or designee shall examine evidence of its reliability, its validity for the intended purpose and for various student populations, and the extent to which it corresponds to the material that is being taught.

The Superintendent or designee shall ensure that assessments are administered in accordance with law and the test publisher's directions and that test administration procedures are fair and equitable for all students.

(ef. 0410—Nondiscrimination in District Programs and Activities)
(ef. 6162.54—Test Integrity/Test Preparation)

As appropriate, assessment results shall be disaggregated by student subgroup, classroom, grade level, and/or school site to allow for critical analysis of student needs.

When districtwide and school-level results of student assessments are published by the state, the Superintendent or designee may provide supplementary information to assist parents/guardians and the local community in **interpreting understanding** test results ~~and evaluating school performance.~~

(cf. 0510—School Accountability Report Card)

Interim and Formative Assessments

~~No individual record of accomplishment shall be released to any person, other than the student's parent/guardian or a teacher, counselor, or administrator directly involved with the student, without the written consent of the student's parent/guardian, or the student if he/she is an adult or emancipated minor. The student or his/her parent/guardian may authorize the release of the record of accomplishment to a postsecondary educational institution for the purposes of credit, placement, or admission. (Education Code 60607)~~

(cf. 5125—Student Records)

State interim and formative assessments may be used in combination with other sources of information to gain timely feedback about student progress in an effort to continually adjust instruction to improve learning, and for communicating with students' parents/guardians and identifying professional development goals. Results from interim and formative assessments shall not be used for any high-stakes purpose, including, but not limited to, teacher or other school staff evaluation, accountability, student grade promotion or retention, graduation, course or class placement, identification for gifted or talented education, reclassification of English learners, or identification as an individual with exceptional needs. (Education Code 60642.6, 60642.7)

The Superintendent or designee shall ensure that teachers who administer interim and formative assessments have access to all functions and information designed for teacher use related to such assessments and student performance on the assessments. (Education Code 60642.6)

Individual Record of Accomplishment

The Superintendent or designee shall ensure that each student, by the end of grade 12, has an individual record of accomplishment that includes the following: (Education Code 60607)

- 1. The results of the state achievement tests required and administered as part of the California Assessment of Student Performance and Progress, or any predecessor assessments, pursuant to Education Code 60640-60649**
- 2. The results of any end-of-course examinations taken**
- 3. The results of any vocational education certification examinations taken**

No individual record of accomplishment shall be released to any person, other than the student's parent/guardian or a teacher, counselor, or administrator directly involved with the student, without the written consent of the student's parent/guardian, or the student if the student is an adult or emancipated minor. The student or the student's parent/guardian may authorize the release of the record of accomplishment to a postsecondary educational institution for the purposes of credit, placement, or admission. Furthermore, the results of an individual student on the CAASPP may be released to a postsecondary educational institution for the purpose of credit, placement, or admission. (Education Code 60607)

Legal Reference:

EDUCATION CODE

- 313 Assessment of English language development*
 - 10600-10610 California Education Information System*
 - 44660-44665 Evaluation and assessment of performance of certificated employees (Stull Act)*
 - 51041 Evaluation of educational program*
 - 51450-51455 Golden State Seal Merit Diploma*
 - 60600-60649 Assessment of academic achievement, especially:*
 - 60640-60649 Standardized Testing and Reporting Program*
 - 60800 Physical fitness testing*
 - 60810-60812 Assessment of English language development*
 - 60850-60859 High school exit examination*
 - 60900 California Longitudinal Pupil Achievement Data System*
- CODE OF REGULATIONS, TITLE 5
- 850-870 Standardized Testing and Reporting program*
 - 1200-1225 High School Exit Examination*
- UNITED STATES CODE, TITLE 20
- 9622 National Assessment of Educational Progress*

Management Resources:

CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS

Key Elements of Testing, 2004

U.S. DEPARTMENT OF EDUCATION PUBLICATIONS

Teachers' Use of Student Data Systems to Improve Instruction, 2007

WEB SITES

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

California Department of Education, Testing and Accountability: <http://www.ede.ca.gov/ta>

Educational Testing Service: <http://www.ets.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 850-876*
- Ed. Code 10600-10610*
- Ed. Code 313*
- Ed. Code 44660-44665*
- Ed. Code 49558*
- Ed. Code 51041*
- Ed. Code 51450-51455*
- Ed. Code 52052*
- Ed. Code 52060-52077*
- Ed. Code 56341.1*
- Ed. Code 60600-60649*
- Ed. Code 60640-60649*
- Ed. Code 60800*
- Ed. Code 60900*
- Ed. Code 60910*

Description

- California Assessment of Student Performance and Progress*
- California Education Information System*
- Assessment of English language development*
- Evaluation and assessment of performance of certificated employees*
- Free and reduced-price meals; use of individual applications and records*
- Evaluation of the educational program*
- Golden State Seal Merit Diploma*
- Accountability; numerically significant student subgroups*
- Local control and accountability plan*
- Assistive technology devices for a student with a disability*
- Assessment of academic achievement*
- California Assessment of Student Performance and Progress*
- Physical performance test*
- California Longitudinal Pupil Achievement Data System*
- California State Preschool Program Longitudinal Pupil Achievement Data System*

Federal

- 20 USC 1401*
- 20 USC 9622*
- Management Resources*

Description

- Assistive technology device; definition*
- National Assessment of Educational Progress*
- Description*

USDOE Office of Educational Technology *Artificial Intelligence and the Future of Teaching and Learning: Publication*
Website *Insights and Recommendations, May 2023*
Website *Metropolitan Educational Research Consortium*
Website *CSBA District and County Office of Education Legal Services*
Website *California Department of Education, Testing and Accountability*
Website *Smarter Balanced Assessment Consortium*
Website *U.S. Department of Education*
Website *CSBA*
Cross References

<u>Code</u>	<u>Description</u>
0410	<i>Nondiscrimination In District Programs And Activities</i>
0415	<i>Equity</i>
0420	<i>School Plans/Site Councils</i>
0460	<i>Local Control And Accountability Plan</i>
0500	<i>Accountability</i>
0510	<i>School Accountability Report Card</i>
1340	<i>Access To District Records</i>
2140	<i>Evaluation Of The Superintendent</i>
4115	<i>Evaluation/Supervision</i>
4131	<i>Staff Development</i>
4315	<i>Evaluation/Supervision</i>
4331	<i>Staff Development</i>
5121	<i>Grades/Evaluation Of Student Achievement</i>
5123	<i>Promotion/Acceleration/Retention</i>
5125	<i>Student Records</i>
5131.9	<i>Academic Honesty</i>
6000	<i>Concepts And Roles</i>
6011	<i>Academic Standards</i>
6020	<i>Parent Involvement</i>
6141	<i>Curriculum Development And Evaluation</i>
6142.6	<i>Visual And Performing Arts Education</i>
6142.7	<i>Physical Education And Activity</i>
6142.91	<i>Reading/Language Arts Instruction</i>
6142.92	<i>Mathematics Instruction</i>
6146.1	<i>High School Graduation Requirements</i>
6146.3	<i>Reciprocity Of Academic Credit</i>
6146.3	<i>Reciprocity Of Academic Credit</i>
6146.5	<i>Elementary/Middle School Graduation Requirements</i>
6151	<i>Class Size</i>
6152	<i>Class Assignment</i>
6152.1	<i>Placement In Mathematics Courses</i>
6155	<i>Challenging Courses By Examination</i>
6158	<i>Independent Study</i>
6159	<i>Individualized Education Program</i>
6161.1	<i>Selection And Evaluation Of Instructional Materials</i>
6162.51	<i>State Academic Achievement Tests</i>
6162.54	<i>Test Integrity/Test Preparation</i>
6163.4	<i>Student Use Of Technology</i>
6164.4	<i>Identification And Evaluation Of Individuals For Special Education</i>
6164.5	<i>Student Success Teams</i>
6170.1	<i>Transitional Kindergarten</i>
6171	<i>Title I Programs</i>
6172	<i>Gifted And Talented Student Program</i>
6172.1	<i>Concurrent Enrollment In College Classes</i>
6173.4	<i>Education For American Indian Students</i>
6174	<i>Education For English Learners</i>
6178	<i>Career Technical Education</i>
6178.2	<i>Regional Occupational Center/Program</i>

6181
6184
6190
9000
9321

Alternative Schools/Programs Of Choice
Continuation Education
Evaluation Of The Instructional Program
Role Of The Board
Closed Session

Policy
adopted: September 17, 2012
revised:

LAKESIDE UNION SCHOOL DISTRICT
Lakeside, California

LAKESIDE UNION SCHOOL DISTRICT

Governing Board Meeting Date: 5/9/2024

Agenda Item:

Board Policy 6170.1: Transitional Kindergarten

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

First Reading: Policy updated to clarify that a child's eligibility for transitional kindergarten (TK) enrollment may not impact family eligibility for a preschool or childcare program and that the district may admit into the TK program a child whose fifth birthday is after the date specified for admittance for the applicable year provided that upon the recommendation of the Superintendent or designee, the Governing Board determines that enrollment in a TK program is in the child's best interest and the child's parents/guardians approve. Policy also updated to reflect NEW LAW (SB 141, 2023) which (1) requires a district that offers TK to early enrollment children to concurrently offer enrollment in a California State Preschool Program, if offered by the district and space permitting, and (2) requires any classroom that includes an early enrollment child to maintain a classroom enrollment that does not exceed 20 students and an adult-to-student ratio of at least one adult to every 10 students. Additionally, policy updated to include that average TK class size enrollment does not include students who are continuously enrolled in and meet the minimum day requirements for independent study for more than 14 school days in a school year.

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"/> Explanation: Click here to enter text. |
| <input type="checkbox"/> Adoption | |

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: _____

TRANSITIONAL KINDERGARTEN

The Governing Board desires to offer a high-quality transitional kindergarten (TK) program for eligible children who do not yet meet the minimum age criterion for kindergarten. The TK program shall assist children in developing the academic, social, and emotional skills needed to succeed in kindergarten and beyond.

The district's TK program shall be the first year of a two-year kindergarten program. (Education Code 48000)

The Board encourages ongoing collaboration among district preschool staff, other preschool providers, elementary teachers, administrators, and parents/guardians in program development, implementation, and evaluation.

*(cf. 1220—Citizen Advisory Committees)
(cf. 6020—Parent Involvement)*

Eligibility

The district's TK program shall admit children as follows: (Education Code 48000)

- ~~1. For the 2021-22 school year, children whose fifth birthday is between September 2 through December 2~~
- ~~2. For the 2022-23 school year, children whose fifth birthday is between September 2 and February 28~~
13. For the 2023-24 school year, children whose fifth birthday is between September 2 and April 2
24. For the 2024-25 school year, children whose fifth birthday is between September 2 and June 2
35. For the 2025-26 school year, and in each school year thereafter, children who turn four by September 1

A child's eligibility for TK enrollment shall not impact family eligibility for a preschool or childcare program, **including, but not limited to, a Head Start program, a childcare center serving children through an alternative payment program, a general childcare and development program, a California State Preschool Program (CSPP), a migrant childcare and development program, childcare and development services for children with special needs, or a program serving children through a CalWORKs Stage 1, Stage 2, or Stage 3 program.** (Education Code 48000).

Parents/guardians of eligible children shall be notified of the availability of the TK program and of the age, residency, immunization, and any other enrollment requirements. Enrollment in the TK program shall be voluntary.

~~(cf. 5111—Admission)~~
~~(cf. 5111.1—District Residency)~~
~~(cf. 5111.12—Residency Based on Parent/Guardian Employment)~~
~~(cf. 5141.22—Infectious Diseases)~~
~~(cf. 5141.3—Health Examinations)~~
~~(cf. 5141.31—Immunizations)~~
~~(cf. 5141.32—Health Screening for School Entry)~~

On a case-by-case basis, a child whose fifth birthday is on or before September 1 may be admitted into the district's TK program upon request of a child's parents/guardians, the district may if the Superintendent or designee determines that it is in the child's best interest.

At any time during the school year, the district may admit into the TK program a child whose fifth birthday is after the date specified for admittance for the applicable year as described above, provided that **upon the recommendation of the Superintendent or designee, recommends the Board determines** that enrollment in a TK program is in the child's best interest and the child's parents/guardians approve. Prior to such enrollment, the child's parents/guardians shall be provided information regarding the advantages and disadvantages and any other explanatory information about the effect of early admittance.

Additionally, the district may enroll an early enrollment child in TK whose fourth birthday is between June 3 and September 1, inclusive, preceding the school year during which they are enrolled in TK. The Superintendent or designee shall maintain any classroom that includes an early enrollment child with a classroom enrollment that does not exceed 20 students and an adult-to-student ratio of at least one adult to every 10 students. Additionally, if an early enrollment child is enrolled in TK, the district shall concurrently offer enrollment to the child in the district's CSPP, subject to available space. (Education Code 48000.15)

Curriculum and Instruction

The district's TK program shall be based on a modified kindergarten curriculum that is age and developmentally appropriate. (Education Code 48000)

~~(cf. 6141—Curriculum Development and Evaluation)~~
~~(cf. 6161.1—Selection and Evaluation of Instructional Materials)~~

The program shall be aligned with the preschool learning foundations and preschool curriculum frameworks developed by the California Department of Education (CDE). It shall be designed to facilitate students' development in essential knowledge and skills related to language and literacy, mathematics, physical development, health, visual and performing arts, science, history-social science, English language development, and social-emotional development.

~~(cf. 5148.3—Preschool/Early Childhood Education)~~
~~(cf. 6011—Academic Standards)~~

~~(cf. 6174—Education for English Language Learners)~~

The Board shall establish the length of the school day in the district's TK program, which shall be at least three hours but no more than four hours long, **including recess but excluding noon intermission**, except for TK students enrolled in expanded learning opportunity programs provided by the district pursuant to Education Code 46120. If the district has adopted an extended-day kindergarten, the length of the school day for the TK program may be different than the length of the school day for the kindergarten program either at the same or different school sites. The Superintendent or designee shall annually report to CDE as to whether the district's TK programs are offered full day, part day, or both. (Education Code 8973, 37202, 46111, 46115, 46117, 48003)

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

~~(cf. 6111—School Calendar)~~

~~(cf. 6112—School Day)~~

The Superintendent or designee shall ~~develop a plan~~ **collaborate with parents/guardians and relevant community groups, in accordance with the plan developed** for how all children in the attendance area of the district will have access to full-day learning programs the year before kindergarten that meet the needs of parents/guardians, including through partnerships with the district's expanded learning offerings, the After School Education and Safety Program, ~~the California State Preschool Program (CSPP)~~, Head Start programs, and other community-based early learning and care programs. ~~The Superintendent or designee shall present such plan for consideration by the Board at a public meeting on or before June 30, 2022.~~ (Education Code 8281.5)

TK students may be placed in the same classrooms as kindergarten students when necessary, provided that the instructional program is differentiated to meet student needs.

TK students may be commingled in the same classroom with 4 four-year-old students from a CSPP program as long as the commingled program meets all of the requirements of each program as well as the following requirements: (Education Code 8207, 48000)

1. The classroom does not include students enrolled in TK for a second year or students enrolled in a regular kindergarten
2. An early childhood environment rating scale, as specified in 5 CCR 18281, is completed for the classroom
3. All children enrolled for 10 or more hours per week are evaluated using the Desired Results Developmental Profile, as specified in 5 CCR 18272
4. The classroom is taught by a teacher that holds a credential issued by the Commission on Teacher Credentialing (CTC) in accordance with Education Code 44065 and 44256
5. The classroom is in compliance with the adult-child ratio specified in Education Code 8241
6. Contractors of the district report the services, revenues, and expenditures for children

in the preschool program in accordance with 5 CCR 18068 except for contractors of the TK program

The district shall maintain an average TK class enrollment of not more than 24 students for each school site, not including students who are continuously enrolled in and meet the minimum day requirement for independent study for more than 14 school days in a school year. (Education Code 48000)

(cf. 5148.3—Preschool/Early Childhood Education)

Staffing

The Superintendent or designee shall ensure that teachers assigned to teach in TK classes possess a teaching credential or permit from the ~~Commission on Teacher Credentialing (CTC)~~ that authorizes such instruction.

(cf. 4112.2—Certification)

A credentialed teacher who is first assigned to a TK class after July 1, 2015, shall, by August 1, ~~2023~~ **2025**, have at least 24 units in early childhood education and/or child development, comparable professional experience in a preschool setting, and/or a child development teacher permit **or an early childhood specialist credential** issued by CTC. (Education Code 48000)

The Superintendent or designee may provide professional development as needed to ensure that TK teachers are knowledgeable about the standards and effective instructional methods for teaching young children, including, but not limited to, developing competencies in serving inclusive classrooms and dual language learners.

(cf. 4131—Staff Development)

The district shall maintain an average or at least one adult for every 12 students for TK classrooms and, contingent upon an appropriation of funding, maintain an average of at least one adult for every 10 students commencing with the 2025-26 school year. (Education Code 48000)

Continuation to Kindergarten

Students who complete the TK program shall be eligible to continue in kindergarten the following school year. Parents/guardians of such students shall not be required to submit a signed Kindergarten Continuance Form for kindergarten attendance.

A student shall not attend more than two years in **kindergarten or** a combination of TK and kindergarten. (Education Code 46300)

(cf. 5123—Promotion/Acceleration/Retention)

Assessment

The Superintendent or designee may develop or identify appropriate formal and/or informal assessments of TK students' development and progress. The Superintendent or designee shall monitor and regularly report to the Board regarding program implementation the progress of students in meeting related academic standards, and student preparedness for future education.

~~(cf. 0500—Accountability)~~
~~(cf. 6162.5—Student Assessment)~~

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>
5 CCR 18000-18308	Early Learning and Care Programs
5 CCR 80067	Professional Clear Early Childhood Education Specialist Instruction Credential
Ed. Code 17375	California Preschool, Transitional Kindergarten, and Full-Day Kindergarten Facilities Grant Program
Ed. Code 33050	Waiver authority and exceptions
Ed. Code 37202	Equal time in all schools
Ed. Code 44065	Issuance of and functions requiring credentials
Ed. Code 44256	Authorization for teaching credentials
Ed. Code 44258.9	County superintendent review of teacher assignment
Ed. Code 44300	Emergency permits
Ed. Code 46111	Kindergarten; hours of attendance
Ed. Code 46114-46119	Minimum school day; kindergarten
Ed. Code 46120	Expanded learning opportunities
Ed. Code 46300	Method of computing average daily attendance
Ed. Code 48000	Minimum age of admission for kindergarten; transitional kindergarten
Ed. Code 48000.15	Early enrollment in transitional kindergarten
Ed. Code 48002	Evidence of minimum age required to enter kindergarten or first grade
Ed. Code 48003	Kindergarten annual report
Ed. Code 48010	Minimum age of admission to first grade
Ed. Code 48011	Promotion/retention following one year of kindergarten
Ed. Code 48200	Compulsory attendance
Ed. Code 8203.3	Development of pre-kindergarten learning development guidelines
Ed. Code 8207	California State Preschool Program administration
Ed. Code 8241	Staffing ratios for center-based program
Ed. Code 8281.5	California Prekindergarten Planning and Implementation Grant Program
Ed. Code 8970-8974	Early primary program, including extended-day kindergarten

Management Resources

			<u>Description</u>
CA Commission on Teacher Credentialing Publication			Proposed Amendments to Title 5 of the California Code of Regulations Pertaining to the PK-3 Childhood Education Specialist Credential, Coded Correspondence 23-02, February 10, 2023
California Department of Education Publication	of	Education	Universal Prekindergarten FAQs
California Department of Education Publication	of	Education	Transitional Kindergarten FAQs
California Department of Education Publication	of	Education	Desired Results Developmental Profile: A Developmental Continuum from Early Infancy up to Kindergarten Entry, 2015
California Department of Education Publication	of	Education	California Preschool Curriculum Framework, Vol. 1, 2010

California Department of Education California Preschool Curriculum Framework, Vol. 2, 2011 Publication
California Department of Education California Preschool Curriculum Framework, Vol. 3, 2013 Publication
California Department of Education California Preschool Learning Foundations, Vol. 1, 2008 Publication
California Department of Education California Preschool Learning Foundations, Vol. 2, 2010 Publication
California Department of Education California Preschool Learning Foundations, Vol. 3, 2012 Publication
CSBA Publication Advancing Universal Transitional Kindergarten, April 2022
CSBA Publication The Importance of Early Childhood Education Programs, September 2019
Website California Department of Education, Universal PreKindergarten, California's Great Start
Website California Office of Administrative Law
Website CSBA District and County Office of Education Legal Services
Website Transitional Kindergarten California
Website California Kindergarten Association
Website Commission on Teacher Credentialing
Website CSBA
Website California Department of Education
Cross References

<u>Code</u>	<u>Description</u>
0500	Accountability
1220	Citizen Advisory Committees
4112.2	Certification
4131	Staff Development
5111	Admission
5111.1	District Residency
5123	Promotion/Acceleration/Retention
5141.22	Infectious Diseases
5141.3	Health Examinations
5141.31	Immunizations
5141.32	Health Screening For School Entry
5145.6	Parent/Guardian Notifications
5148.2	Before/After School Programs
5148.3	Preschool/Early Childhood Education
6011	Academic Standards
6020	Parent Involvement
6111	School Calendar
6112	School Day
6141	Curriculum Development And Evaluation
6151	Class Size
6161.1	Selection And Evaluation Of Instructional Materials
6162.5	Student Assessment
6174	Education For English Learners

Legal Reference:

EDUCATION CODE

- ~~8207 California State Preschool Program administration~~
- ~~8241 Staffing ratios for center based programs~~
- ~~8281.5 California Prekindergarten Planning and Implementation Grant Program~~
- ~~8970-8973 Early primary programs; extended day kindergarten~~
- ~~17375 Establishment of California Preschool, Transitional Kindergarten, and Full Day Kindergarten Facilities Grant Program~~
- ~~37202 School calendar; equivalency of instructional minutes~~

~~44065 Issuance of and functions requiring credentials~~
~~44256 Authorization for teaching credentials~~
~~44258.9 Assignment monitoring by county superintendent of schools~~
~~46111 Kindergarten, hours of attendance~~
~~46114 46119 Minimum school day, kindergarten~~
~~46120 Expanded Learning Opportunities Program~~
~~46300 Computation of ADA, inclusion of kindergarten and transitional kindergarten~~
~~48000 Age of admission, kindergarten and transitional kindergarten~~
~~48002 Evidence of minimum age required to enter kindergarten or first grade~~
~~48003 Kindergarten annual report~~
~~48011 Admission on completing kindergarten~~
~~48200 Compulsory education, starting at age six~~
CODE OF REGULATIONS, TITLE 5
~~18000-18434 Child care and development programs, especially:~~
~~18068 Attendance and expenditure reports~~
~~18272 Developmental profile~~
~~18281 Environment rating scales~~

Management Resources:

CSBA PUBLICATIONS

~~*What Boards of Education Can Do About Kindergarten Readiness, Governance Brief, May 2016*~~

CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS

Transitional Kindergarten FAQs

~~*Desired Results Developmental Profile: A Developmental Continuum from Early Infancy up to Kindergarten Entry, 2015*~~

~~*Transitional Kindergarten Implementation Guide: A Resource for California Public School District Administrators and Teachers, 2013*~~

~~*California Preschool Curriculum Framework, Vol. 3, 2013*~~

~~*California Preschool Curriculum Framework, Vol. 3, 2012*~~

~~*California Preschool Curriculum Framework, Vol. 2, 2011*~~

~~*California Preschool Curriculum Framework, Vol. 2, 2010*~~

~~*California Preschool Curriculum Framework, Vol. 1, 2010*~~

~~*California Preschool Learning Foundations, Vol. 1, 2008*~~

WEB SITES

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

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

~~California Kindergarten Association: <https://californiakindergartenassociation.org/>~~

~~Commission on Teacher Credentialing: <http://www.ctc.ca.gov>~~

~~Transitional Kindergarten California: <http://tkealifornia.org>~~